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IMPLEMENTATION OF THE ACTIVE AGEING CONCEPT IN THE SCOPE OF PROFESSIONAL ACTIVITY ON THE POLISH LABOUR MARKET

Abstract

Ageing of the population constitutes a global phenomenon. This process not only means that the number of the elderly people in population increases, but also entails the demographic changes which influence several social-economic mechanisms, including labour market. Combating its adverse consequences on labour market includes actions directed at extending the professional activity of individuals and the increase in employment indicators of persons in immobile working age and it is a significant element of implementing the concept of active ageing. Implementing certain solutions covered by the concept of active ageing, together with the extension of retirement age, is perceived as the remedy on some adverse consequences (especially those concerning the labour market and pension systems) associated with the process of societies' ageing. Therefore, projects and programmes are passed on EU and national levels, which strives to boost the activity of senior citizens. This article attempts to analyse chosen indicators connected with aims included in the *Programme of Solidarity between Generations. Actions to Increase Professional Activity of Persons over 50 (Program solidarność pokoleń. Działania dla zwiększenia aktywności zawodowej osób w wieku 50+)*, while using the data from the Eurostat's database and analyses such as *Balance of Human Capital (Bilans Kapitału Ludzkiego)*.

Keywords: active ageing, labour market, elderly people

Abstrakt

Starzenie się ludności jest fenomenem globalnym. Proces ten nie oznacza jedynie wzrostu liczebnego populacji osób starszych, ale wiąże się także z przemianami demograficznymi, które wpływają na szereg mechanizmów społeczno-gospodarczych, w tym na rynek pracy. Przeciwdziałanie jego negatywnym konsekwencjom dla rynku pracy obejmuje działania ukierunkowane na wydłużenie aktywności zawodowej jednostek oraz wzrost wskaźników zatrudnienia osób w niemobilnym wieku produkcyjnym i stanowi ważny element realizacji koncepcji aktywnego starzenia się. Implementowanie pewnych rozwiązań zawartych w koncepcji aktywnego starzenia się, obok wydłużania wieku emerytalnego, postrzegane jest jako remedium na niektóre negatywne konsekwencje (zwłaszcza te dotyczące rynku pracy i systemów emerytalnych), które niesie za sobą proces starzenia się społeczeństw. To spowodowało, że zarówno na gruncie unijnym, jak i państwowym uchwalane są projekty i programy, których zadaniem jest pobudzenie aktywności osób starszych. W artykule podjęto próbę analizy wybranych wskaźników odnoszących się do celów określonych w *Programie Solidarność pokoleń. Działania dla zwiększenia aktywności zawodowej osób w wieku 50+*, wykorzystując przy tym dane pochodzące z baz danych Eurostatu oraz badań takich jak *Bilans Kapitału Ludzkiego*.

Słowa kluczowe: aktywne starzenie się, rynek pracy, osoby starsze

Introduction

The decrease in fertility and mortality, extension of the life expectancy and migration processes are the main reasons underlying the process of societies' ageing. Within the next decades Poland, like other developed countries, will have to face the problems resulting from the growth in the share of older people in the society. The burden on social security and healthcare systems, as well as the need to ensure the elderly

people's care are the most commonly indicated adverse consequences of ageing of societies. One should not forget that the process covers also broader issues, including the labour market which will be increasingly becoming the employee's market in the next decades. As a result of growing proportion of older people in the society, the approach to work and career path will change. Employers will have to accept the fact that the resources of the working force will be limited and an average age of employees will rise. Those changes triggered that the concept of active ageing became the essential element of EU policy in the last decade, especially in reference to the extension of professional activity of individuals.

The threat of labour force shortage, in particular in low-paid jobs which do not require special qualifications, draws the attention to the actions striving to increase professional activity of persons in pre-retirement and retirement age. Those actions focus on the following issues: elimination of existing barriers, promoting the lifelong learning idea, creating conditions to increase qualifications, developing organisational culture friendly to persons above 50 years old and preventing discrimination based on age.

According to OECD and European Union's recommendations, rising retirement age meets social resistance, especially due to the fact that that in 90s. of the 20th century the practice of pushing the elderly people out of the labour market, so that youth could find jobs, was very common in many European countries. Therefore, nowadays the increasing of the professional activity of persons in immobile working age has become one of the most important elements of implementing the concept of active ageing on EU level. It is also one of the priorities of Polish policy towards the elderly because the employment rate of persons aged 55 to 64 in Poland in 2014 amounted to 42,5% and was one of the lowest in European Union (the value for 28 EU countries was 51,8%) [Eurostat: employment – LFS adjusted series (lfsi_emp)]. However, one should also remember that the concept of active ageing is not only limited to issues of increasing professional activity of the elderly people. The significant element is to promote the social activity of the elderly, and professional activity is in fact one of its mainstays.

Active ageing concept in political projects

According to one of the most popular definition proposed by World Health Organisation (WHO) "active ageing is the process of optimizing opportunities for health, participation and security in order to enhance quality of life as people age" [WHO 2002: 12]. Active ageing is "the process to optimise chances connected with health, participation and safety in order to increase the life quality of older persons. It is the general public policy programme against the process of population's ageing aiming mainly at enhancing the satisfaction and level of life of individuals thanks to the system of health and social care; respecting rights, needs and preferences of the elderly people; maintaining body and cognitive fitness, as well as promoting various forms of professional and after work activity" [Ervik and Lindén 2013 cited by Turek 2015: 58]. The main assumption of this concept is the call for maintaining social activity of an individual as long as possible. The activity is displayed on the levels of: work, health, relations, providing appropriate standard of life and education, and it aims to help an individual to prepare for old age in individual aspect. One can clearly see here the faith in the effectiveness of mechanisms encouraging the elderly to remain active longer. Due to the fact that the concept of active ageing includes so many different aspects, its implementation requires public institutions on different level to be involved in it [Wysokińska 2013: 47].

The concept appears in many documents and EU's programmes. It was first mentioned in the communication of European Commission of 1999 entitled *Towards a Europe for All Ages* [Commission of the European Communities 1999]. Despite the fact that the definition of active ageing was not mentioned in this document, it was concluded that this concept constitutes the paradigm of European policy towards societies' ageing. Next documents entailed the extension of the statements included in the above-mentioned communication, however they limited the understanding of active ageing only to the labour market and work. Those issues were included in the *Lisbon Strategy* and then *Europe 2020 Strategy*. Unfortunately, the goals provided in the *Lisbon Strategy* were not achieved. In particular, it concerns the aim to achieve the activity rate of the EU citizens aged 55 to 64 years old on the level of 50% in 2010. Therefore, *Europe 2020 Strategy* only mentions the activity rate of the population in working age (20-64) to be on the level of 70% in 2020. This does not mean that the issues of professional activity of senior citizens were left out in the document. It states that the growth of population's activity may be achieved by the increase of activity of women and older people. It may be achieved by introducing appropriate legal regulations which would help

older employees on labour market, enable them lifelong learning and provide social care. [Wysokińska, 2013 47–50].

European Union designated year 2012 as the European Year for Active Ageing and Solidarity between Generations, which was followed by issuing several supporting documents. In the special statement The Council of the European Union underlined the importance of this action and together with the Social Protection Committee and the Employment Committee agreed on the *Guiding Principles on Active Ageing and Solidarity between Generations*. In relation to employment those rules refer to: constant vocational education and training, promoting healthy work conditions, implementing and developing the strategy of age management, developing the employment services for older workers, actions preventing discrimination based on age, reviewing current taxation systems and benefits encouraging employment, using knowledge and abilities of older employees, adjusting work conditions and offering solutions to combine work and care [Council of the European Union, 2012: 8–9].

The above-mentioned goals are only recommendations and guidelines. The way of their implementation depends on the member states. It is worth adding that the European Union also formulate unified provisions unconditionally binding within its entire area, and its implementation by the member states is usually achieved by issuing acts and regulations.

Guidelines and goals included in *Europe 2020 Strategy*, as well as in the *Guiding Principles on Active Ageing and Solidarity between Generations* gained a hearing in Polish programmes and documents. On 24 January 2014, the Council of Ministers issued Order no. 237 on introducing the *Governmental Programme for the Social Activity of Older People for 2014–2020 (ASOS)*. The programme was introduced in order to implement the *National Development Strategy 2020*. “The Programme aims to increase the quality and the level of life of the elderly people for the respectful ageing by way of social activity. The programme is supposed to result in taking a more comprehensive use of the social and professional potential of older people, so that they could play different social roles in the public life” [Uchwała nr 237 2014: 9]. The main goal is to be achieved by fulfilling the detailed goals in the following four priorities: education of the elderly people, social activity promoting inner and cross generations integration, social participation of older people and social services for them.

Those matters were covered in the Order No. 238 of the Council of Ministers of 24 December 2013 on the introduction of the document *The Assumptions of Long-term Senior Policy in Poland for 2014–2020*. However, it was stressed in the document that the discussion on the issue of professional activation of persons over 50 years old includes only the most important matters covered during the meeting of the Council on Senior Policy, as the issues are described in a broader manner in the prepared at the same time update to the *Programme of Solidarity between Generations. Actions to Increase Professional Activity of Persons Over 50*, which was adopted by the Order no. 239 of the Council of Ministers of 24 December 2013.

The main aim of the programme was to achieve the employment rate for persons aged 55–64 on the level of 50% in 2020. Moreover, six detailed goals were designated: 1. adjustment of the competencies and enhancing the qualification of persons over 45 considering the needs of the labour market, 2. developing organisational culture and work environment more friendly for employees over 50, 3. increasing the effectiveness of the actions promoting employment and professional activity, 4. supporting the idea of active and healthy ageing, 5. development of cooperation for the employment growth of people over 50, 6. social transfers helping professional activity of people in the pre-retirement age. The programme constitutes an update of the programme of 2008. The Implementation Document with the description of tasks reported for implementation under the amended programme and its indicators should have been issued until 2014. Unfortunately, until the end of 2016 the document has not been written.

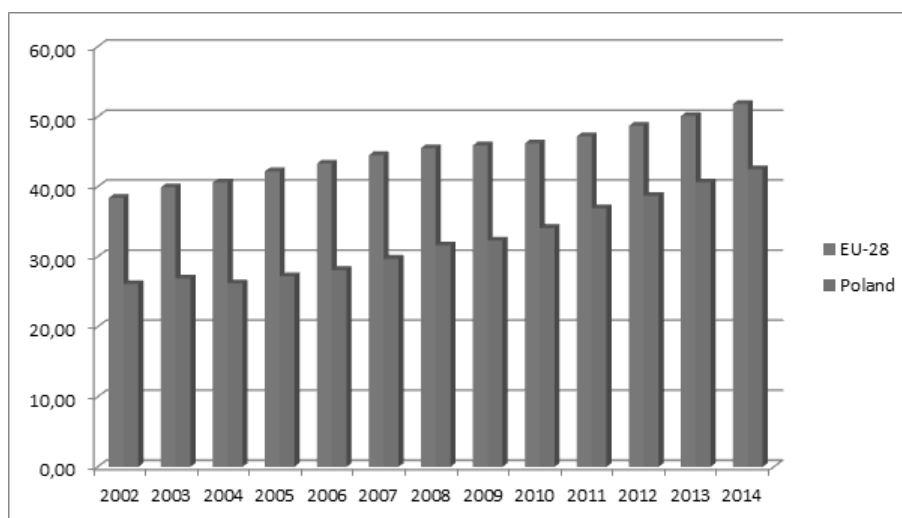
It is worth to mention that in the amended programme the direction of actions was shifted and they mainly focused on enhancing the qualifications of employees over 50 years in order to adjust them to the labour market's requirements. Due to that, the area of professional activation is almost inseparably linked to the area of education of the elderly people under the concept of active ageing. It was also underlined that it is of significant importance to set solutions aiming at assisting to maintain good health and physical condition of employees, as they are one of the crucial conditions of the ability to work. From that point of view it should be assessed that the implementation of the concept of active ageing in the Polish context seems to be complementary, because each of its areas are meshed together.

Professional activity of older people

The analysis of all indicators which could be created for the goals provided in the amended programme would be too extensive, all the more that for each of them a several priorities were designed. Therefore, below I shall analyse some indicators, which refer to the main goal and two of the first detailed goals (adjustment the competencies and enhancing the qualification of persons over 45 considering the needs of the labour market and developing organisational culture and work environment more friendly for employees over 50) designed in the new programme.

The most important indicator illustrating the main goal inspiring the implementation of the programme is the employment rate of persons aged 55 to 64 years (chart 1). In Poland, the value of this indicator in the entire analysed period was lower than in the European Union. In 2003–2006 the increase of the indicator was higher in the European Union than in Poland, and the difference in 2006 was over 15 percentage points. However, in 2007 the employment of persons of 55–64 years was growing faster in Poland, as a result of it the difference of the indicator value between Poland and the European Union was decreasing, so that in 2014 it amounted to slightly over 9 percentage points. Since 2009 the clear increase in professional activity of persons in this age group was observed in Poland, which was influenced by the change of law and blocking the possibility for early retirement. Unfortunately, in 2014 as many as 57,5% of people of this age were inactive. Taking into account the assumed value of the employment rate of persons aged 55 to 64 years in 2020 on the level of 50%, it can be presumed that further intensification of the activities striving to professional activation of the people over 50 will be of key importance to fulfil the main goal of the programme.

Chart 1. Employment rate of persons aged 55 to 64 in Poland and European Union in 2002–2014 (in %)



Source: own calculations based on the Eurostat database: Employment – LFS adjusted series (lfsi_emp).

In the programme of 2013 horizontal priorities (one of them is supporting employment of women over 50 years) were also described. Unfortunately, in detailed goals the 6th goal of the programme of 2008 was excluded, which was increasing the possibility to employ women by the development of services enabling to combine work and family life. It seems, that it was not the best decision, because, as it appears from the data and analysis, one of the main reasons for reducing the dimension of employment or even resigning from work by women is taking care of a child or a disabled adult. In 2014 as many as 29,8% of European women and almost 9% of Polish woman limited the time of work for that reason. [Eurostat: Labour Force Survey (LFS)].

Increasing of the professional activity of the people in immobile working age is very important. Important arguments which support those actions are the data in table 1. Life expectancy in Poland at age 65 for women as well as men is shorter than in the European Union. Whereas the average age of retirement in both

cases is lower, which means that the expected length of retirement period among Poles is in average approx. 1,5 year longer than among Europeans.

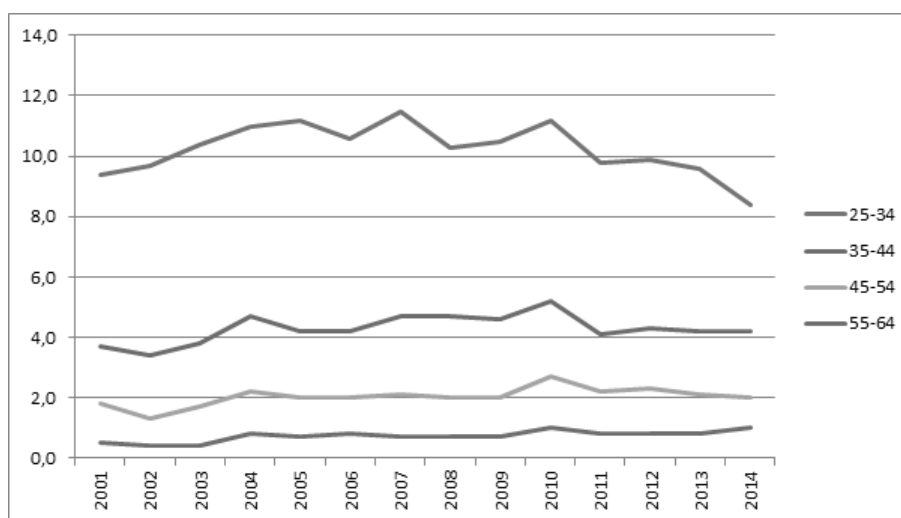
Table 1. Life expectancy, average retirement age and expected length of retirement in Poland and European Union in 2012

	Poland		European Union	
	Women	Men	Women	Men
Life expectancy at age 65	19,8	15,4	21,1	17,7
Average age of retirement	56,1	58,5	58,8	59,4
Expected length of retirement period	28,7	21,9	27,3	23,3

Source: own calculations based on the Eurostat databases: Mortality (demo_mor), Transition from work to retirement (lfso_12).

The element of crucial importance in order to increase the professional activity of the elderly people on the labour market is enhancing their competences by participation in the courses and trainings, which are one of the elements of non-formal education. People aged 25 to 34 years very often participate in trainings, while people aged 55 to 64 years less often. In 2014 nearly 8,5% of persons aged 25 to 34 years, only 2% of persons aged 45 to 54 years and 1% of persons aged 55 to 64 years participated in trainings in the last four weeks. It is worth stressing that the share of the youngest part of the population taking part in trainings dropped from 2012. The proportion of Europeans' participation in the trainings is much higher in each age group. In 2014 9% of the people aged 45 to 54 years and almost 6% of people aged 55 to 64 years took part in trainings. Other surveys also confirm low educational activity of Poles and little interest in enhancing the qualifications. The analysis of the Balance of Human Capital (BHC) survey results, carried out in 2010–2014, shows that in case of training involvements we can talk about stagnation in Poland [Turek, Worek 2015: 82]. We may draw the same conclusion from the analysis of the Survey of Educational Activity of Adults (SEAA) [GUS, 2013]. What are the reasons for such a situation? Respondents participating in the BHC survey most commonly pointed out inner barriers, such as the lack of the need to enhance professional competences, lack of time or motivation and not being ready to re-qualify. Older people who prepare to retire in the next few years do not see the point in investing their time and money in increasing their qualifications. We may also indicate outer reasons, including the non-alignment of the knowledge scope and the way it is passed to the needs and competences of the recipients, which declines the effectiveness of the trainings [Turek 2015: 64].

Chart 2. Participation of Poles in trainings in the last 4 weeks divided by 10-years age groups (in %)

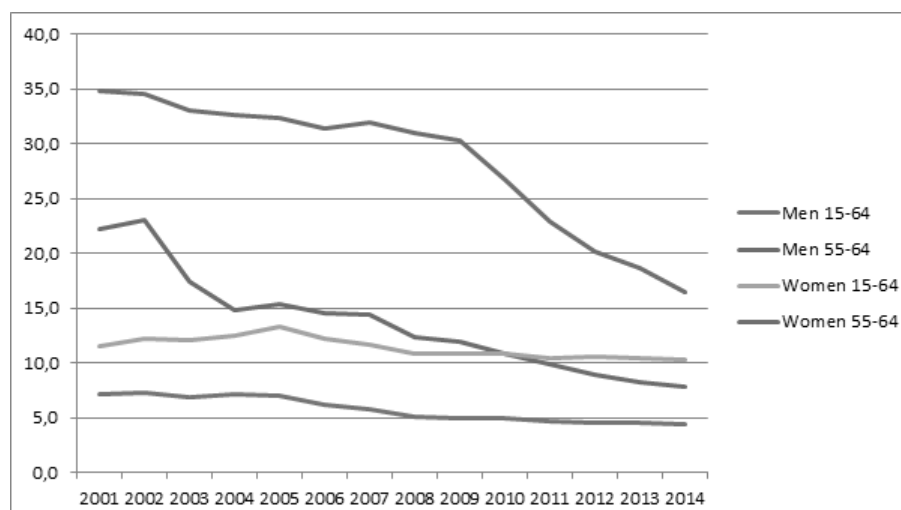


Source: own calculations based on the Eurostat database: Adult learning (trng_ad).

Such low participation level in enhancing qualifications by Poles in comparison with the Europeans requires to introduce next legislative solutions that enable employers to reduce costs connected with investing in increasing the qualifications of people in immobile working age. The quality of trainings and courses organised as non-formal education should also be ensured, so that they would fill in the blanks in the competences of people participating in the labour market, having in mind to strengthen the hard as well as the soft competences. That kind of education should prevent the knowledge to become outdated. The learning process of adults and elders is carried out in a different way than the process of learning of younger people, and that is why they require help in this area. In order to achieve that, mentors – the teachers of older people or job coaches – can appear needed. Their tasks include, among other activities, assisting senior citizens in education process and helping them in preparing individual career plan and professional development, which is modified depending on the labour market conditions and individual skills [Kowalska-Dubas 2013: 65-66].

Older people will be more eager to participate in the labour market if they feel motivated and satisfied with their work, which can be achieved by disseminating flexible forms of work and part-time work, as well as the idea of the age management. The age management constitutes a new approach to human management in the organisation, which can be treated as the set of methods of investing in and taking care of human capital, so that work (regardless of age) would be beneficial for the company and satisfying for the employees [Urbaniak 2013: 157]. Regrettably, the idea of the age management is not yet popular in Poland. We can find that out by checking what employers declare to expect of candidates for the jobs. This matter is mentioned in the BHC survey. In 2010–2012 the average bottom age limit of a candidate for job was 24 years in employers' opinion. In case of manager's positions and specialists it was 26–27 years. Whereas the average upper age limit of the candidate for work was 44 years. Only 11% employers accepted candidates aged 60 years and over. Slightly over one third of them was eager to employ 50 years old and over 50 persons, while for 21% employers age did not matter at all. Survey also shows that during recruitment process age is taken into consideration more often than experience [Turek 2013: 100–101]. The fact that already during recruitment stage older people have less chances to be employed than younger people proves that there is lack of good practices in the age management in Polish companies. That is why it is a lot to be done in this area, which requires promoting the idea of age management among Polish employers, as well as financial support for those employers who will implement a solution in this area.

Chart 3. Percentage of men and women aged 15 to 64 years and 55 to 64 years working part-time (as a percentage of women and men aged 15 to 64 years and 55 to 64 years employed full-time) in Poland in 2001–2014 (in %)



Source: own calculations based on the Eurostat database: Full-time and part-time employment – LFS series (llfsa_empftpt).

The concept of the age management also assumes creating work environment friendly for older people. These activities also include introducing such facilitations as the possibility for part-time work and flexible

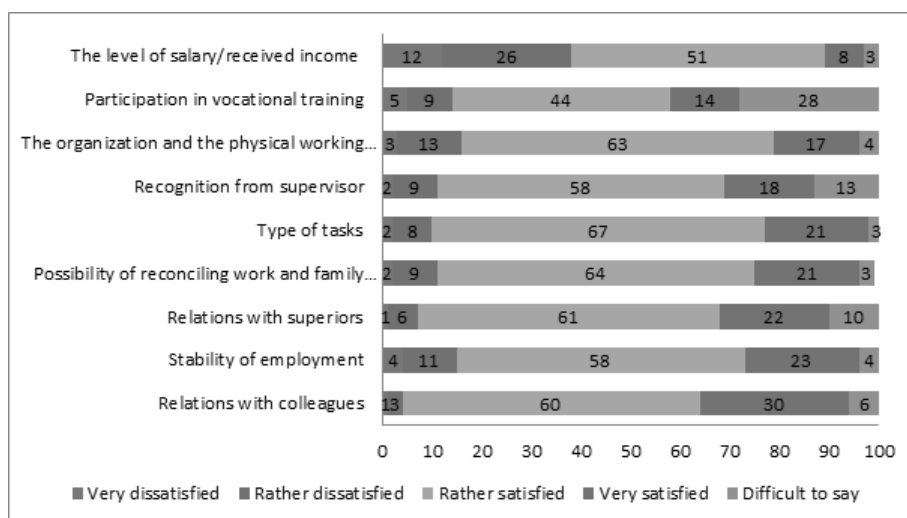
working hours, so that senior citizens could strike a proper balance between work and health restrictions or limitations resulting from the necessity to take care of the dependent people in the family (especially in case of women).

Older people work part-time more often than the younger ones. In 2001 almost 35% of women and 22% of men aged 55 to 64 worked part-time in Poland, while among people aged 15 to 64 years it was only 11,6% of women and 7,2% of men. The share of people working part-time in a working age population was at around similar level in 2014, while in the population aged 55 to 64 years it was dropping in case of women (16,5%), as well as men (7,8%). The rapid decrease, especially among older women, was noted in 2009. However, such participation of people aged 55 to 64 years working part-time means that the age management policy in Polish companies should consider the possibility of limiting the work time for people over 50 years old.

Regrettably, the data published in the Eurostat's database (full-time and part-time employment – LFS series) are incomplete and do not allow to clearly describe the reasons for taking a part-time position for people aged 55 to 64 years. There is a lack of data when it comes to such reasons as: child care or care over disabled adult and education, and Polish respondents most often choose the answer “other reasons” (66% in 2014), which limits the possibility for interpretation. Yet, it is worth stressing that in 2001–2014 an increase was noted of the percentage of people working part-time due to the reason such as not finding a full-time job (from 6% in 2001 to 17,9% in 2014), whereas at the same time the percentage of persons who pointed the reason to have health problems and their own disability decreased (23,9% in 2001 and 12,2% in 2014). It confirms the results of the surveys mentioned before that employers prefer to employ people aged between twenties to forties of age.

Implementing the concept of the age management and developing the organisation's culture and work environment more friendly for employees over 50 should lead to greater work satisfaction for that part of the population. It is shown that older people are pleased with most aspects referring to their professional life. In the light of the result of the survey *Diagnosis of current situation of women and man over 50 on the labour market in Poland* (chart 4) they are not satisfied with their salary level (12% are very dissatisfied, 26% are rather dissatisfied). 4% of the respondents are very discontent of the employment stability (11% rather dissatisfied), and 3% are very dissatisfied with the organisation and physical working conditions (13% are rather dissatisfied). 90% of those surveyed assess relations with co-workers positively (30% are very pleased and 60% are rather pleased), and 83% are pleased with their relations with supervisors (22% are very pleased and 61% rather pleased), which means that work atmosphere is assessed as conducive.

Chart 4. Satisfaction assessment of the chosen work aspects by persons over 45/50+



Source: Urbaniak B. (2013), *Podstawowe charakterystyki zatrudnienia kobiet i mężczyzn w wieku 45/50+*, [w:] *Diagnoza obecnej sytuacji kobiet i mężczyzn 50+ na rynku pracy w Polsce. Raport końcowy*, red. E. Kryńska, J. Krzyszowski, B. Urbaniak, J. Wiktorowicz, Wydawnictwo Uniwersytetu Łódzkiego, Łódź, s. 143.

Such a positive assessment of various aspects of their own work situation may be kind of surprising, especially that almost 42% of women and 32,3% of men surveyed, when asked about the plans for the future, answered that their careers were coming to its end or had already ended and they did not think about returning to work. 33,5% of men and slightly above 30% of women said that they wanted to be professionally active only until they reach retirement age, and almost 25% of men and almost 20% women wanted to remain active even after their retirement age. It seems that the willingness to retire or continue work in the current workplace affects the level of life satisfaction. People who want to continue their work after having reached retirement age are more satisfied with their life. The level of satisfaction is much lower among women than among men. Furthermore, women who pass to older age groups feel less and less satisfied, whereas men are more and more satisfied [Urbaniak 2013: 148, 151–152].

Conclusions

Implementing the concept of active ageing on the Polish labour market has quite short tradition, and some describe its period until 2008 with the term “fasade” ageing policy [Ervik and Lindén 2013 cited by Turek 2015: 58]. In this period Poland was only adjusting to EU's requirements in this scope and did not take any real actions aimed at implementing certain solutions. Only issuing in 2008 of the first version of the programme *Solidarity between Generations. Actions to Increase Professional Activity of Persons over 50* gave a boost to take real actions in order to increase social, cultural, educational and professional activity of people over 50.

New version of the programme of 2013 covered a broad scope of actions, and the basis for extending the period of professional activity was the implementation of the concept of active ageing. Its emphasis was put on the issue of enhancing and updating professional competences, age management and developing the organisational culture friendly for people over 50. However, the mistake was not to include the issue of increasing the amount of women employed and the development of services enabling to reconcile work commitments and family life. Increasing the diversity and improving the quality of educational offer for older people is also one of the aims of *Governmental Programme for the Social Activity of Older People for 2014–2020*. Emphasising the need to lifelong learning derived from very low educational activity indicators. In this context, it should be remembered that the unwillingness of employers to hire senior persons results from their belief in low and outdated qualifications of this part of population.

The effects' assessment of the programmes aimed at increasing professional activity of the elderly people that has been introduced will be possible in a few years. The key moment will be 2020 when according to *Solidarity between Generations...* the employment rate of people aged 55 to 64 years should reach 50%. In order to make it possible, actions should be taken aimed at maintaining professional activation of currently working people, as well as the actions directed at professionally inactive and unemployed people, which are provided by the implementation of detailed aims of the programme.

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