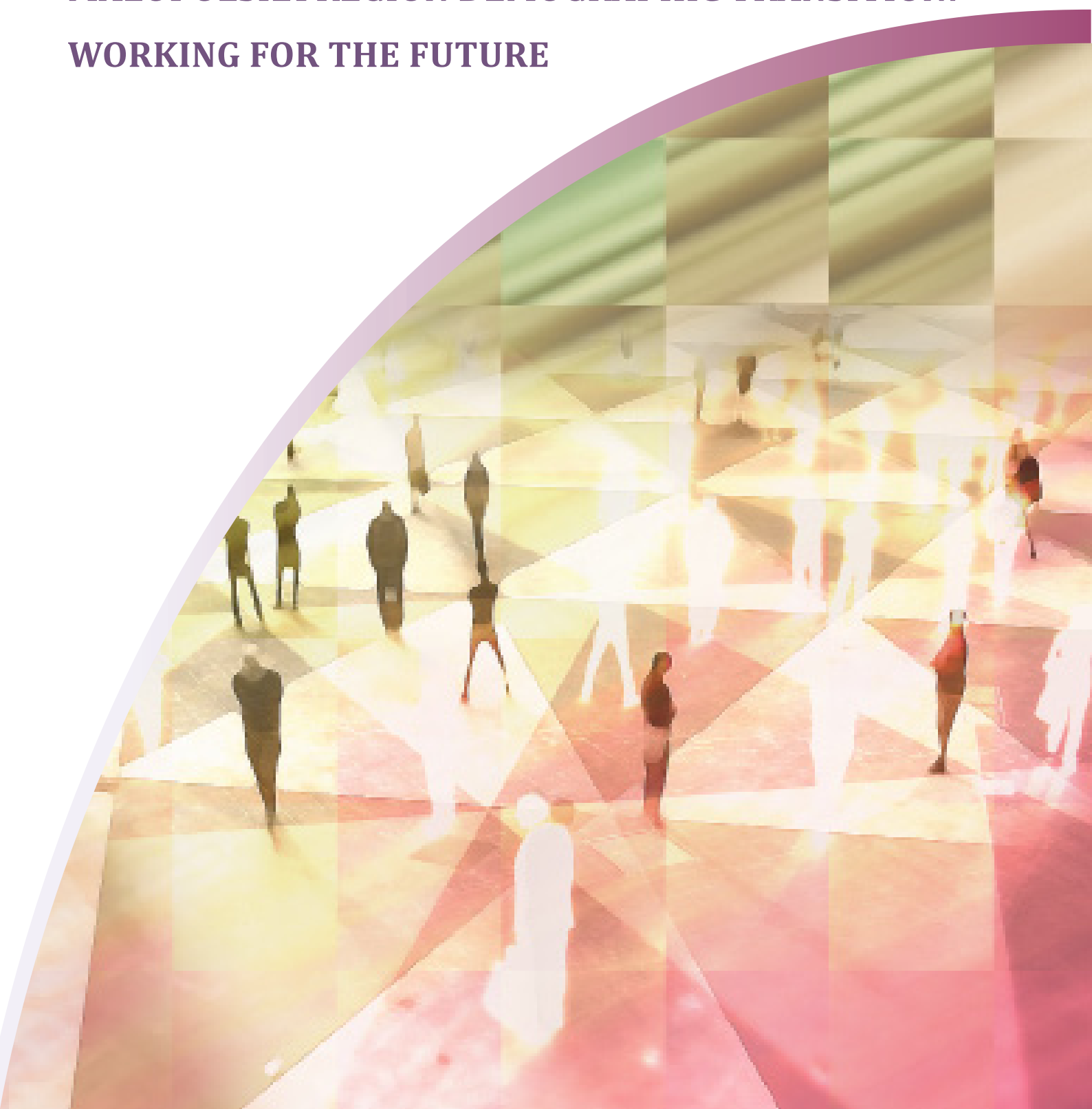


## **MAŁOPOLSKA REGION DEMOGRAPHIC TRANSITION: WORKING FOR THE FUTURE**



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## TABLE OF CONTENTS

DISCLAIMER.....	2
ABOUT THE OECD.....	3
ABOUT LEED .....	3
ACKNOWLEDGEMENTS .....	5
TABLE OF CONTENTS .....	6
TABLES .....	7
FIGURES .....	7
BOXES .....	8
EXECUTIVE SUMMARY .....	9
CHAPTER 1: INTRODUCTION.....	13
CHAPTER 2 CHARACTERISTICS OF THE MAŁOPOLSKA REGION .....	15
2.1. Demographic change 1990-2010-forecasting .....	15
2.2. Socio-economic characteristics and labour markets .....	23
2.2.1 Economy.....	23
2.2.2 Labour market .....	24
CHAPTER 3 OLDER WORKERS; SILVER ECONOMY AND WHITE ECONOMY .....	27
3.1 Older workers.....	27
3.2 The silver and white economy .....	31
CHAPTER 4 SKILLS AND TRAINING ECOSYSTEM.....	35
CHAPTER 5 SOCIAL TRANSFORMATION AND INCLUSION.....	39
CHAPTER 6 GREEN REGIONAL/INDUSTRIAL ATTRACTIVENESS .....	44
CHAPTER 7 REGIONAL/LOCAL INITIATIVES AND POLICY ISSUES .....	47
7.1 Examples of local initiatives.....	47
7.2 Small- scale policy survey .....	51
CHAPTER 8 KEY CONCLUSIONS AND RECOMMENDATIONS FOR MAŁOPOLSKA.....	55
REFERENCES .....	62
ANNEX .....	64

## TABLES

Table 1 The education level of persons in age 15-64 in Małopolska in selected year .....	25
Table 2 Number of establishments per 10 000 inhabitants in Małopolska Region in the years 2002-2010	26

## FIGURES

Figure 1 Map of Małopolska .....	14
Figure 2 Population of Małopolska region in years of 1995-2010 .....	15
Figure 3 Population size of urban and rural population in Małopolska in 1995-2010 .....	16
Figure 4 Population projections by urban and rural in Małopolska till 2035 .....	17
Figure 5 The internal and external migration balance, 1995-2010 .....	18
Figure 6 Fertility rates in 2002-2010 .....	19
Figure 7 Population structure by economic age in Małopolska in years 2002-2010 .....	20
Figure 8 Population structure by age groups in Małopolska in years 1991-2009 .....	20
Figure 9 Population structure by economic age in Małopolska in years 2012-2035 - projections .....	21
Figure 10 Share of 65+ in 1995 .....	22
Figure 11 Share of 65+ in 2010 .....	23
Figure 12 Employment rate (15-64) by total and by gender in Małopolska Region in the years 1995-2010 .....	25
Figure 13 Employment rate of older workers in Małopolska .....	27
Figure 14 Employees 50+ by selected sectors of the Polish Classification of Activity in Małopolska in 4th quarter of 2009 (in thousands) .....	28
Figure 15 The average rank of areas which describe the elderly friendly place to live .....	52
Figure 16 The comparison of current evaluation and importance of specific areas of the OLWOF topic index in Małopolska .....	54

## BOXES

Box 1 Business in Małopolska and in Kraków – new perspectives .....	24
Box 2 Age management practices .....	29
Box 3 Some recommendations regarding the situation of older workers in the labour market .....	31
Box 4 An example of intergenerational collaboration via NGO and health sector Stowarzyszenie Lekarzy Nadziei (Kraków) - SLN .....	33
Box 5 Silver and white economy recommendations .....	33
Box 6 The Małopolska Partnership of Labour Market, Education and Training Institutions .....	36
Box 7 An example of initiative for older citizens in Nowy Sącz city – The Third Age University.....	36
Box 8 An example of initiative for older citizens in Kraków city – The Fullness-Of-Life Academy.....	37
Box 9 The example of initiative for older citizens in Kraków city .....	38
Box 10 The care services for older inhabitants in gmina Lipinki.....	40
Box 11 The kindergarten “Time of Children Dreams” .....	41
Box 12 Stowarzyszenie Doradców Europejskich PLinEU (The Association of European Advisors – PLinEU).....	41
Box 13 Social transformation and inclusion recommendations .....	42
Box 14 Regional and local policy recommendations .....	48
Box 15 Some key facts about The Centre of Culture and Recreation for Seniors in Nowa Huta district of the Kraków city .....	49
Box 16 Some key facts about the Club of Social Integration in Nowa Huta, Kraków.....	50
Box 17 Recommendations related to the health, geriatric and long-term care identified by “Challenges of the Małopolska report” .....	60



## EXECUTIVE SUMMARY

Demographic change is one of the key challenges for local development today; strategic solutions must take into account the interplay of elements within a particular local area of development. At the same time, there are opportunities to be fostered, such as the development of the silver economy by older entrepreneurs, the white economy for medical services for the elderly population, and the green economy.

This paper outlines the findings of the Poland case study for the Małopolska region, for the international project *Local scenarios of demographic change*. The project is conducted by the Organisation of Economic Development and Co-operation (OECD) Local Economic and Employment Development (LEED) Programme with the support of the European Commission DG Employment, Social Affairs and Inclusion. The analysis in Poland was conducted in partnership with the Ministry of Regional Development and the regions of Pomorskie, Łódzkie and Małopolska.

The Małopolska region (NUTS 2) was created in 1999 from voivodship amalgamations of Kraków, Nowy Sącz, and parts of Bielsko-Biała, Kielce, Katowice, Krosno and Tarnów. Although the population size is not expected to change dramatically over the next few years, the consequences of population ageing are and will be challenging. However, the region has much potential in different sectors that can be exploited in order to prepare itself for the demographic transitions to come. This report presents various examples of initiatives and projects related to demographic issues (older workers, older persons, and families) within the region, with the support of European Union funds. Awareness of demographic challenges and the need for better policy implementation are considered important at the regional level.

Findings of the study highlighted the following issues:

- Although the Małopolska region has experienced significant population growth since 1990, the urban population has been declining, due to falling fertility rates and migration out of the agglomerated cities (mostly in the sub-region of Kraków).
- The employment rate in the region is lower than it was when Poland entered the EU. In 2010, the region had an employment rate of 50.1%, with women's employment rates being approximately 10-12% lower than men's. Unemployment has recently experienced an increase of 9.4% from 2009 to 2010, mainly due to the economic slowdown in 2009. The private sector dominates the number of entities in the region (97.6%), most of which are small to medium sized enterprises (SMEs), which are more susceptible to economic fluctuations.
- The region is also experiencing population ageing; in Kraków city, there will be a 40% increase in the number of persons aged 65+ from 2010 to 2035. The employment rate of older workers (+55) in the Małopolska region in 2011 was 47.8% for men and 27.1% for women. The employment rate of those aged 65+ was 6.9%. In response, the Małopolska region has undertaken projects and programmes, in line with national programmes, directed at increasing the employment and economic activity of people over 50. Regionally, there are a number of projects supporting the employability of older workers and providing assistance for unemployed people 45+.

- Age management within firms is currently limited, and age-based discrimination exists, despite legislation aimed at preventing it, and therefore needs to be addressed. The overall labour market is not favourable for older workers, due to fewer jobs being available, and the perception that older workers are: less productive; more expensive; less educated; and reluctant to change. Opportunities exist in the silver economy, especially in therapeutic services, due to the ageing population and change in the retirement age.
- Although the white economy has a number of public and non-public hospital beds and spa resorts, the sector is physically overburdened and poorly paid. On the plus side, the region offers health prevention programmes promoting active and healthy lifestyles. It was highlighted that the development of the silver and white economies will require better education and training in these sectors, and promotion of their potential to bring new jobs.
- The region has a highly developed educational system, including Małopolska universities, especially the university in Kraków, and its economy is heavily dependent on students living in the city. The vocational school system in the region has been at the forefront of the provinces, achieving the highest results in professional examinations in Poland. However, adult participation in training in the region is very low (less than 5%), prompting regional authorities in 2007-08 to implement a programme aimed at increasing life-long learning. The Universities of the Third Age (UTAs) and other institutions, such as public libraries and non-government organisations, provide education and activities for seniors, thus also preventing social exclusion. Over the past decade, there have been many such initiatives funded by the European Social Fund.
- The social assistance sector in the Małopolska region has been growing, thereby creating new jobs while providing invaluable services to the community. The old age dependency ratio in the region has been increasing from 16.1% in 1991, to 19.2% in 2010, requiring more health support and long-term care. Recently, there has been a substantial increase in old-age pensioners. In 2010, 7.8% of the Małopolskan population received social assistance benefits, mostly due to poverty and unemployment. The majority of these people are families with children, therefore, overburdening of families is an issue - while parents are engaged in work, they rely heavily on grandparents to assist with the children's upbringing, yet conversely, there is a lack of intergenerational communication.
- The Małopolska region has green and tourism attractiveness; Kraków city is well known and recognised as an historical, cultural and academic centre, and this attracts visitors and tourists. The region is divided into parts, with the western part of the region being dominated by industry, supported by technical infrastructure. The northern part of the region provides favourable conditions for agriculture, however, it has slow economic development growth. The southern part is rich in natural and tourism resources (geographically – hills, mountains etc), which are supported by infrastructure aimed at tourism, such as spas and health/rehabilitation centres. The south-eastern part is dominated by agriculture/horticulture, however, industry and services have been developed under the framework of a special economic zone. The eastern part of the Małopolska region (primarily Tarnów city) is predominantly developing service sectors with entrepreneurship activity; besides being an academic centre, it is also the centre for new technology development. The possibilities of developing a green economy in the region are limited, as this sector will be sensitive to changing economic conditions.

At present, the most important strategic planning document in the region is the Development Strategy of the Małopolska region (2011-2020), which outlines goals and directions for intervention and which is composed of seven thematic parts. Demographic issues are covered under the *environmental, health and social safety* section, which includes numerous themes, such as 6.3. *Improving social safety by integrating social policy*. Another strategic document, entitled *Challenges of Małopolska*, highlights key recommendations in the context of an ageing population. There have also been numerous initiatives

directed at the ageing population, provided by the Regional Centre for Social Policy and via projects like the ADAPT2DC .

The results of two regional questionnaires indicated ‘under average’ scores for Małopolska as an Elderly Friendly Place to Live (ELFRI) and Older Worker Friendly Place to Work (OLWOF) (ratings are between 1 and 5, with 3 being considered average). The ELFRI had below average results for all areas: outdoor spaces and buildings; transport; housing (public and private); social participation; respect and social inclusion; civic participation and employment; communication and information; and community support and health services. The OLWOF also had below average results for all areas: recruitment; work culture and opportunities; training and skills development opportunities; and company health and benefits; however, participants did note the importance of having friendly places to work for older workers, thus highlighting a policy gap.

The results indicate that population ageing will be a key demographic challenge for the region in the future, with the focus being on older workers, age management, education and training, health and social services. It is important to note that regional decision makers are well aware of the region’s demographic changes, which places the region in a good position from which to act. The region’s geographic and natural attractiveness and human resources provide a basis for future economic development and growth. However, strategies need to be holistic; links are needed between policy themes, such as family, ageing and seniors policies; co-operation, involving stakeholders, sharing of experiences and cross-regional approaches are all tools that should be promoted.

Key elements for policy development are:

- *Data, information and knowledge:* re-evaluate and re-design the current system of information/statistical data at regional and local levels in order to develop a tool for policy makers to quickly identify and diagnose current trends. The sharing of knowledge between municipalities and co-operation with all stakeholders in a systematic way would increase willingness and trust to undertake joint actions.
- *Family policy:* solutions that will reconcile work and childcare are needed. By developing various supportive options such as crèches, new family childcare systems, home care facilities, and projects activating informal childcare, such as “Be a grandmother/grandfather” or the “Bank of Time” initiative, family-friendly policies could make a significant difference. Kindergartens should be made more widely available, with flexible hours; and support should be given for the establishment of employer’s kindergarten/childcare facilities at the workplace.
- *Ageing population:* there is a need for various and more tailored solutions that will improve the quality of life of all citizens. These include care systems: development of an elderly care system is needed, and adjustments need to be made to existing institutions, or new ones need to be built, which satisfy the care needs for single elderly persons. Social activity, which aims to prevent older people from experiencing social exclusion, and support for initiatives which activate the potential of senior citizens are required. Education, such as support for Universities of the Third Age (UTAs) and other senior education projects; courses or training for retired persons to help them create new professions in care and support areas for the elderly, and engaging others in social activity are all excellent motivators. Additionally, suitable transport and housing impact significantly on the well-being and quality of life of all people.
- *Migration:* maintenance of the positive migration trends for young people, professionals and seniors. There is a need to further support education initiatives and develop quality educational opportunities and programmes that will encourage young people (both Polish and foreign) to migrate to the region. The region needs to be promoted as being an attractive place to work and live for business professionals, with the development of new work opportunities such as business

centres. Opportunities exist to encourage seniors to migrate to the region, by developing options for better living for the elderly.

- *Labour market*: the employment rate of people living in the region is not as high as it was prior to entering the European Union. Further efforts need to be made to create work opportunities for all groups and remove barriers that are hindering those who want to work. Initiatives could be introduced to: engage inactive persons in public and utility works and social co-operatives; inspire entrepreneurship, by supporting new business start-ups; introduce mechanisms that encourage persons aged over 60 to work part-time, and promote intergenerational team work, with minimal impact on pension benefits. Age management practices need to be promoted among employers and adjusted to specific industry sectors in order to support the ageing workforce and remove the negative perception of older workers. Age management initiatives include: more flexibility, such as semi-retirement; reduced working time and workloads; more flexible work hours; training opportunities with younger workers; and assisting with plans for retirement.
- *Silver economy*: the silver economy provides economic development opportunities within the region. The preparation of concrete action plans, based on the recommendations from the strategic planning document, “Challenges of Małopolska”, are required in order to promote the silver economy.

## CHAPTER 1 INTRODUCTION

On 1 January 1999, Polish administrative reform came into force. In addition to pension, education and health care reforms, the reforms introduced two new levels of local government, which resulted in changes to the number of voivodships (from 49 to 16), and alterations to the boundaries and names. As a result, the Małopolska voivodship/region<sup>1</sup> (NUTS-2) was created, which amalgamated the earlier voivodships of Kraków, Nowy Sącz, and parts of the voivodships of Bielsko-Biała, Kielce, Katowice, Krosno and Tarnów<sup>2</sup>.

Currently, Małopolska is divided into 19 land districts (powiat level), 3 municipal districts (the cities of Kraków, Tarnów, and Nowy Sącz) and 182 municipalities (gminas), and covers over 15 000 square kilometres (sq/kms), which corresponds to 5% of the entire territory of Poland.

The Małopolska voivodship is rich in traditions and customs, containing unique historical monuments such as Wawel Castle, and numerous natural curiosities like the Dunajec River Gorge. These features make the region one of the most attractive tourist areas not only in the country, but within Europe.

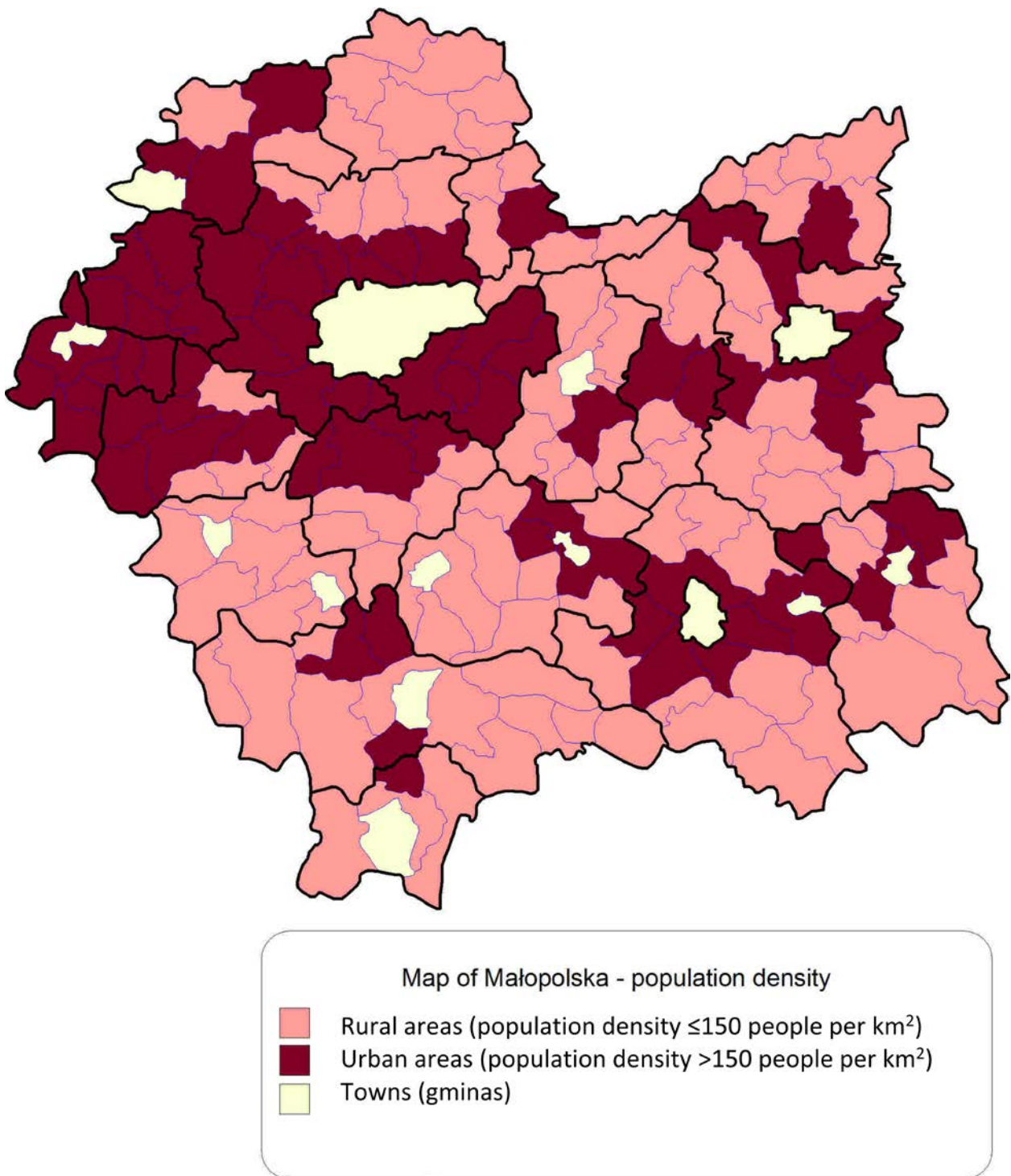
This report discusses the Małopolska region in the context of the demographic changes that are taking place there; and analyses secondary data, case studies, study visits and workshop discussions, in order to provide strategic guidelines for governments at different levels (regional and local) and organisations (private and public) involved in policy making to sustainably manage **Małopolska to enable it to cope with demographic changes**.

The report is divided into three main sections: 1) an overall presentation of the region focusing on: demographic changes and forecasts; socio-economic characteristics and labour markets; older workers and silver economy; skills and training systems; social transformation and inclusion; white sector; green regional and industrial attractiveness; and regional and local policies and initiatives. 2) Analysis of two key indexes related to liveability and workability of an area for older workers. 3) Key conclusions and recommendations related to demographic change in Małopolska and the possibilities for and barriers to regional and local development due to demographic change. Study visits and workshop discussions are presented in Annex 2.

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<sup>1</sup> In the report, both ‘region’ and ‘voivodship’ are used interchangeably. The same applies to gmina with municipality; and powiat with county.

<sup>2</sup> There have been additional administrative changes in the region’s borders, which could impact on some indicators from the database of the Central Statistical Office (at 01/01/2002 Dz.U., Nr 62 poz.631, 2001 and at 01/01/2003 r. - Dz. U. Nr 191, poz.1594 z 2002).



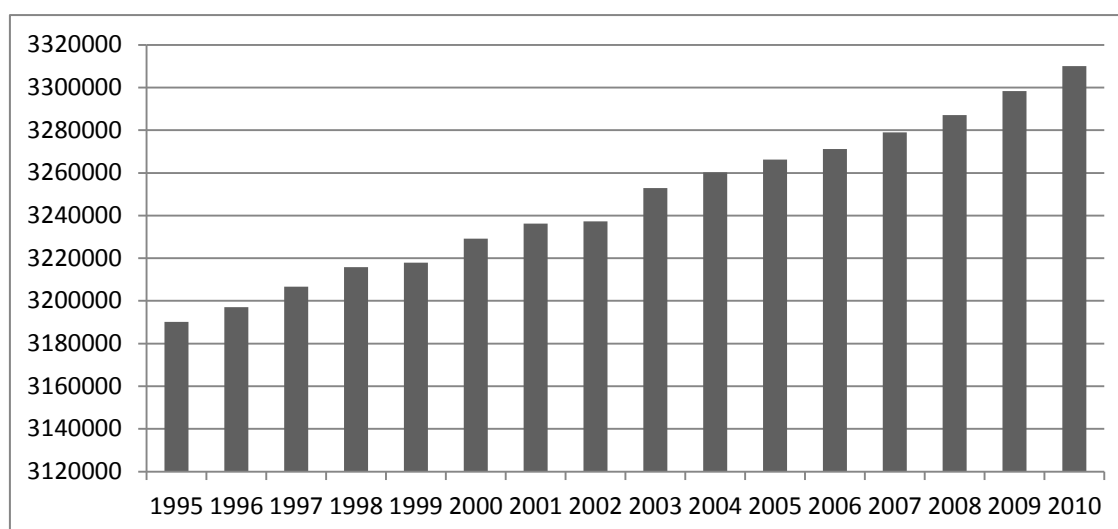
**Figure 1 Map of Małopolska**

*Source:* Marshall's Office of the Małopolska region (Department of Regional Policy)

## CHAPTER 2 CHARACTERISTICS OF THE MAŁOPOLSKA REGION

### 2.1. Demographic change 1990-2010-forecasting<sup>1</sup>

At the end of 2010, the population in Małopolska was 3.3 million people (Central Statistical Office of Poland, CSO, 2012), which accounted for 8.7% of the population of Poland. In 2010 it was also ranked fourth among regions, behind: Mazowieckie; Śląskie; and Wielkopolskie. Figure 2 illustrates the increase in the total population from 1995-2010. In this respect, the Małopolska region is better situated than other regions of Poland. In fact, from 1996 to 2007, Poland had experienced a population loss of approximately 127 000 people in total. As in Małopolska, population increase was observed in the Pomorskie, Mazowieckie, Wielkopolskie, Kujawsko-Pomorskie and Lubuskie voivodships.



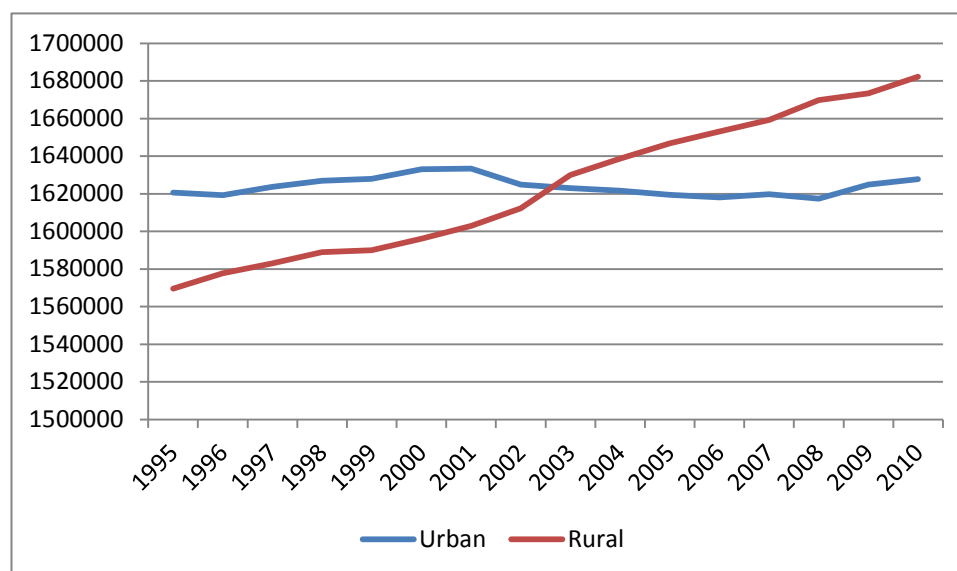
**Figure 2 Population of the Małopolska region, 1995-2010**

*Source:* Central Statistical Office of Poland, 2012

Małopolska's cities in 2010 had a total population of 1 627 800, representing 7% of the Polish urban population. In the same year, Kraków, the capital of Małopolska, had a population of 756 200 (23% of the total for Małopolska). From 2001 to 2009, the urban population within the Małopolska region was in decline, reaching its lowest population in 2008 of 1 617 300 (Figure 3). This decline was due to lower fertility rates in urban areas and also due to some migration outside of the agglomeration of the cities (mostly in the sub-region of Kraków). In 2010, there was an observed increase of 10 300 people, but this was mainly due to an increased level of fertility and also increases in the urban areas within the Małopolska region (the granting of city rights for three locations: Bobowa, Szczucin and Radłów). In 2010, the rural areas were inhabited by 1 682 300 persons, or 11.2% of the whole Polish rural population, which

<sup>1</sup> Refer also to the chapter by Joanna Urbanowicz in the 2011 Annual Regional Report for the Małopolska voivodship 2011 (Kraków, 2012).

ranked Małopolska second after the Mazowieckie region. The rural population has grown steadily, due to high migration rates from the cities (particularly the municipalities lying directly in the vicinity of Kraków), and a positive population growth. Housing amenities have much to do with this phenomenon - around Kraków are pleasant, environmentally friendly places in which people can live in their own new houses, as opposed to living in small flats within large community buildings from the socialistic era.



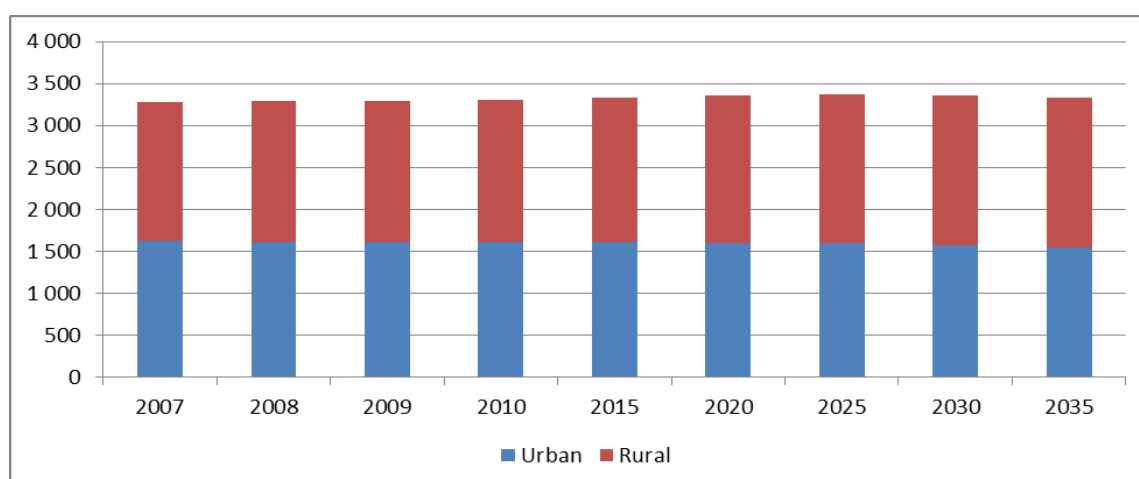
**Figure 3 Urban and rural population sizes in Małopolska, 1995-2010**

Source: Central Statistical Office of Poland, 2012

The latest Central Statistical Office of Poland (2012<sup>2</sup>) predictions are for further increases in Małopolska's population to the year 2025, followed by an observable decrease (Figure 4). Also projected is the expected increase in the number of people aged 65+; from 467 092 in 2010 to 734 657 in 2035, which indicates a significant ageing of the population. In Kraków city alone, the demographic projections estimate that there will be more than 769 000 inhabitants by 2035, including 166 768 people aged 65+, which is a 40% increase in this age group compared to 2010 figures. The consequences of the projected population decline and increase in population ageing will have a profound impact on the Małopolska's resources and policy/decision-making for the region.

<sup>2</sup> In addition to the Central Statistical Office's projections, a detailed demographic projection for all poviats of Małopolska was prepared (Kurkiewicz, 2011). This forecast was developed in 2009 for the period to 2035. Currently, the Central Statistical Office is developing the next version of the population forecast, which is based on the data obtained from the 2011 National Census.





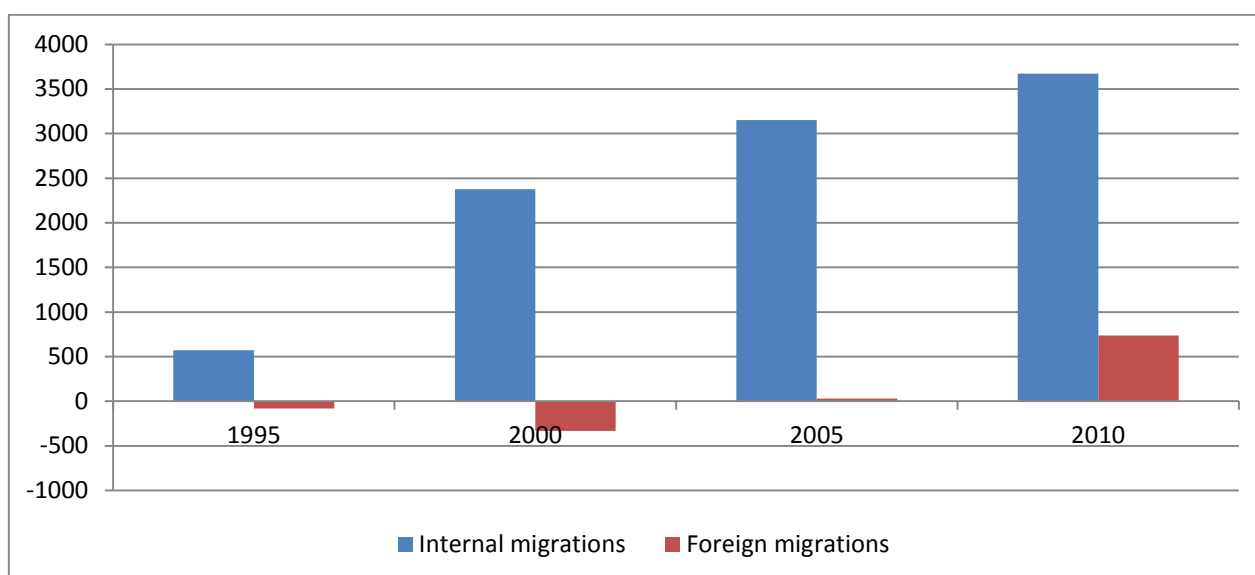
**Figure 4 Urban and rural population projections in Malopolska to 2035**

*Source:* Central Statistical Office of Poland, 2012

The average population density in Małopolska in 2010 was 218 persons per square kilometre (sq/km), which was higher than the national average of 122 persons per sq/km, and the second highest in the country after Śląskie. There is considerable spatial diversity in the region, with the most densely populated areas located within the central and western parts of the region, while the lower densities are in the northern and south-eastern regions, as illustrated in Figure 1.

It should be noted that Małopolska is characterised by an exceptionally high and increasing rural population density; 123 persons per sq/km, which ranks first in the country, whereas the national average is only 51 persons per sq/km for rural populations. The higher rural population density, together with the considerable dispersion of settlements in the Małopolska region, creates significant pressures on environmental resources and leads to high costs in technical infrastructure.

In 2010, there was a large increase (12 000 more people than in 2009) in the region's population growth,) as a result of: increased rates of child birth (in absolute numbers, the crude birth rate in Małopolska was 11.3 per 1,000); lower mortality rate than in other regions; and a significant, positive level of migration (net migration of 4 500 people). Compared to the national average, the population of the Małopolska region was characterised by a relatively high natural growth (natural increase) rate of 2.3 per 1 000 inhabitants, whereas in 2002-2005, Poland's natural increase experienced negative values, and between 2006-2010 has been only slightly positive at 0.9 per 1 000. Only the Pomorskie and Wielkopolskie regions are experiencing a higher natural growth rate. The higher birth rate could be explained by cultural attitudes towards the traditional family unit (especially in rural areas), and better and more widely available health diagnosis opportunities and medical treatment would result in lower mortality rates. Additionally, the population growth is related to migration figures, as both internal and foreign migration rates were positive in Małopolska in 2010 (Figure 5).



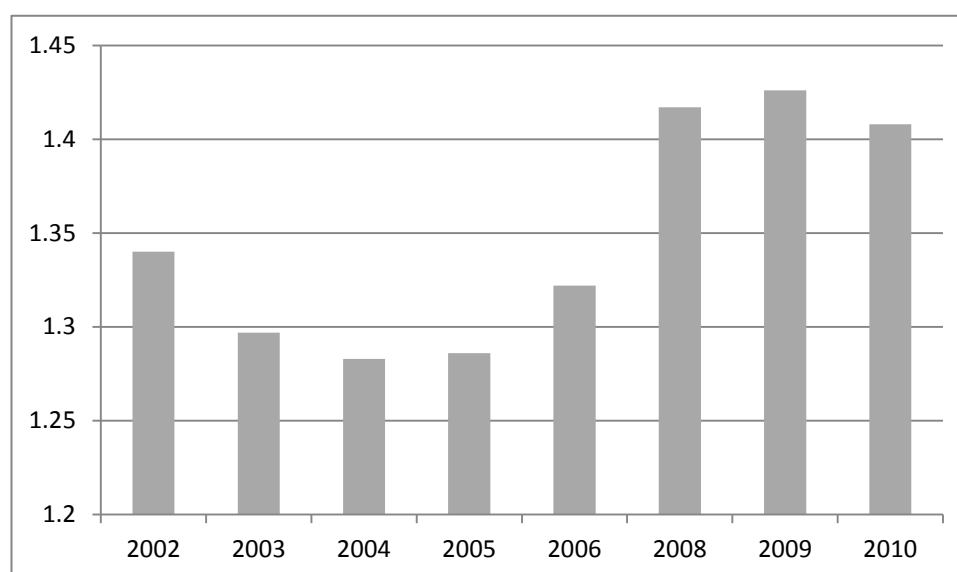
**Figure 5 The internal and external migration balance for Malopolska, 1995-2010**

*Source:* Central Statistical Office of Poland, 2012

The overall birth rates<sup>3</sup> in Małopolska from 2000 to 2010 fluctuated from 10.9 in 2000, to 9.9 in 2003 and 2004, up to 11.4 in 2009, and decreasing slightly in 2010 to 11.3. There were also differences in the birth rates between rural and urban areas. The lowest rural birth rate was in 2006 (10.8 per 1 000), and since 2007 there has been a clear increase of approximately 20 000 births per year to the current (2010) rate of 11.9. Within the cities, the birth rate rose from 2004-2009 (8.7-10.8 per 1 000 respectively); and in 2010, there was a slight decrease to 10.6 per 1 000. Nevertheless, the high birth rate was a result of the children of the ‘baby boomer’ era reaching their fertile age in the 1980s. However, the total fertility rate<sup>4</sup> in 2010 was still low (1.4), and was lower in the urban areas (1.3), than in rural areas (1.5), with a trend of decreasing infant mortality rates (in 2010 - 4.53) (Figure 6).

<sup>3</sup> Birth Rates - the number of births per 1 000 people

<sup>4</sup> Fertility rate - expresses the number of births compared to the number of women aged 15-49 years



**Figure 6 Fertility rates in 2002-2010**

*Source:* Central Statistical Office of Poland, 2012

Migration clearly affects the population level of the region. Małopolska has been an attractive destination for those living outside the region, as detailed analysis indicates (data from Central Statistical Office, 2012, see Figure 5). This could be easily explained by the fact that the region has a lot of higher education institutions (such as the universities in Kraków), with many coming there to study (temporary stay), and then staying after graduating, as there are many job opportunities for highly educated persons available here, which offer incentives to settle in the region (the unemployment rate in Kraków in 2011 was just 4.8%) and, in general, public opinions is that there is a good quality of life to be found in the region.

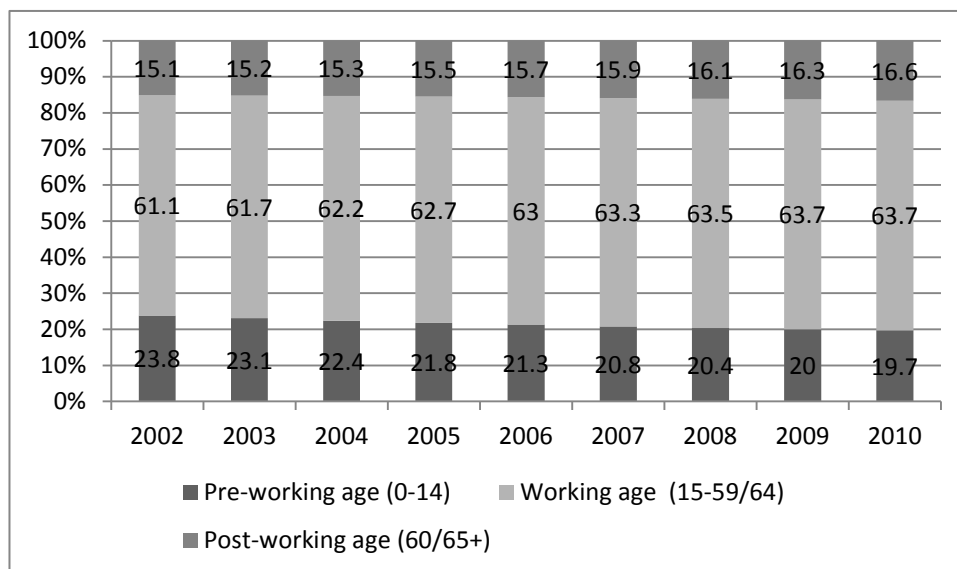
As migration will be a key factor in maintaining population growth in the future, it should be explored thoroughly within regional policy development, through processes such as maintain and improve considerations for the quality of educational institutions; promoting and supporting entrepreneurship and business investments; and maintain and improve systems for the various aspects relating to quality of life.

The region's gender population structure showed a slight predominance towards women (51.5% in 2010). The feminisation ratio<sup>5</sup> was 106 and remained unchanged for many years, due to the fact that, according to life expectancy indicators, women on average live longer than men. As for the rest of the country, levels depended on the place of residence, for example, in the rural areas there were 102 women for every 100 men, while in the cities there were 111. In the years 2009-2010, this rate has slightly flattened.

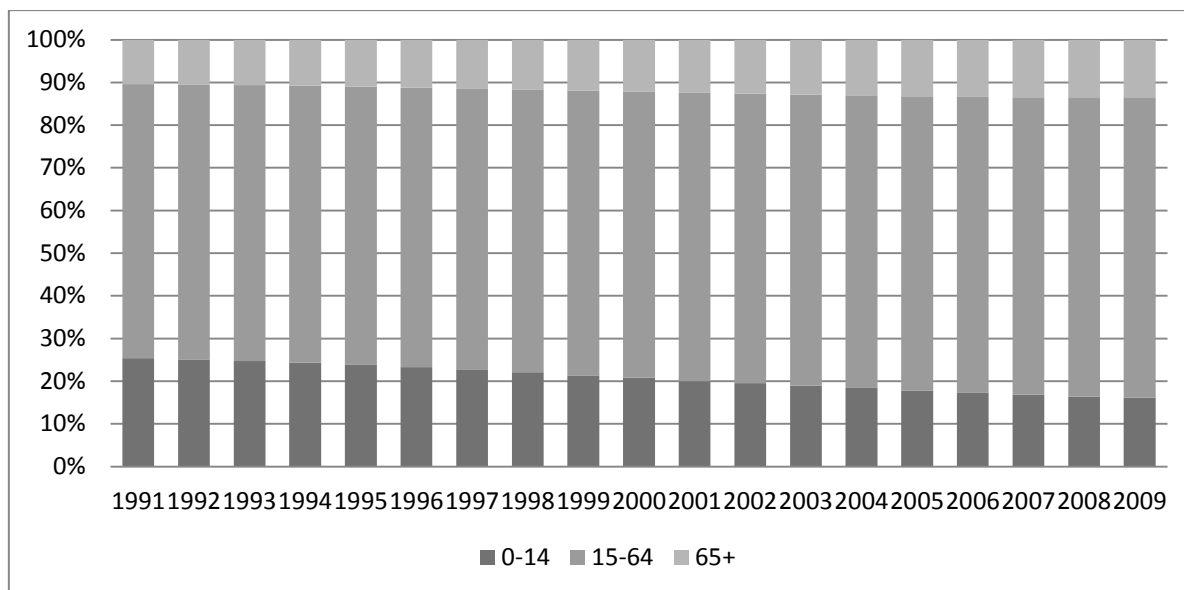
Małopolska has experienced changes in its economic population age structure (Figure 7). There has been a declining trend in the population share of people in the pre-productive age (0-14); this dropped from 28.4% in 1995 to 19.7% in 2010. Linked with this, there has been a trend of systematic increase in the productive age range of 15-59/64 (there was a difference in retirement age for men and women), from 57.8% in 1995 to 63.7% in 2010. At the same time, the percentage share of the post-productive age population is increasing, up from 13.8% in 1995 to 16.6% in 2010. These rates will change in the future, as the retirement age for men and women is being increased to 67, but despite this, it is noticeable that over time there has been a decline in the number of children and young people (aged 0-14), while there has been

<sup>5</sup> Feminisation ratio - the ratio between the number of women and men

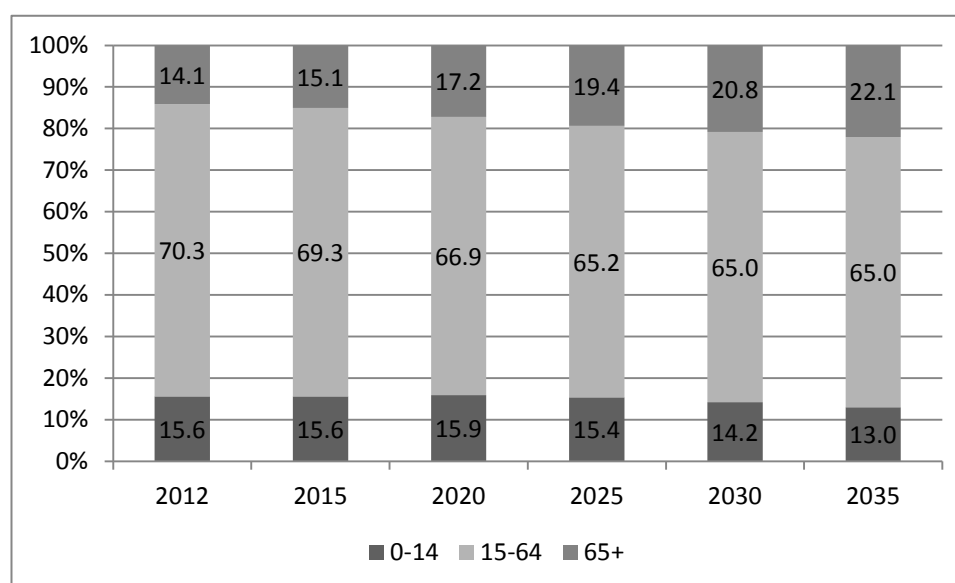
an increase of people aged 65+ (Figure 8). These dynamic changes will place future additional pressure on the labour market, services, and infrastructure requirements for the region, see Figure 9.



**Figure 7 Population structure by economic age in Malopolska in years 2002-2010**  
 Source: Central Statistical Office of Poland, 2012.



**Figure 8 Population structure by age groups in Malopolska in years 1991-2009**  
 Source: OECD stats database



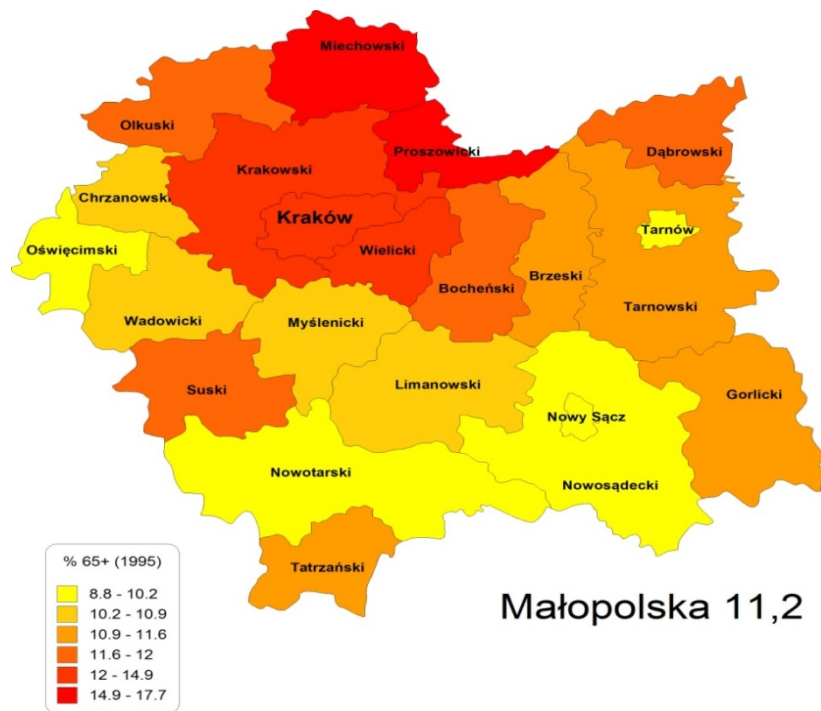
**Figure 9 Projected population structure by principal age groups in Malopolska, 2012-2035**

*Source:* Central Statistical Office of Poland, 2012.

The pace of these changes, however, has been much slower than the national average. The primary impact on the first two age groups (pre-productive and productive) resulted in the number of births decreasing by the year 2003, and those people born in the early 1980's, during the last baby boom, entering into the labour force. The growing population at retirement age is associated mainly with an increase in life expectancy. In the period between 2000-2010, male life expectancy age was extended by 2.4 years and women's by 2.6 years. The difference between life expectancy ages for men and women continues to deepen. The average life expectancy of residents of the Malopolska region is significantly higher than the average for Poland - men live longer by 1.6 years and women by 1 year. In 2010, the average life expectancy in the Malopolska region was 73.7 for men, and 81.4 for women. In Kraków, for 2010, the average life expectancy was 75.1 years and for women, 81.5 years (Central Statistical Office of Poland, 2012). This could be explained by the fact that in Malopolska, people are relatively better educated, and education is an important factor in life expectancy. Additionally, over the last 20 years, since the beginning of these changes, there are better and more available preventative health checks and diagnoses, and better hospital-based medical treatment and regional medical centres, particularly in Kraków. Such improvements in medical facilities, combined with changes in life-style, could explain the increase in life expectancy rates and the higher value of this indicator compared to other regions.

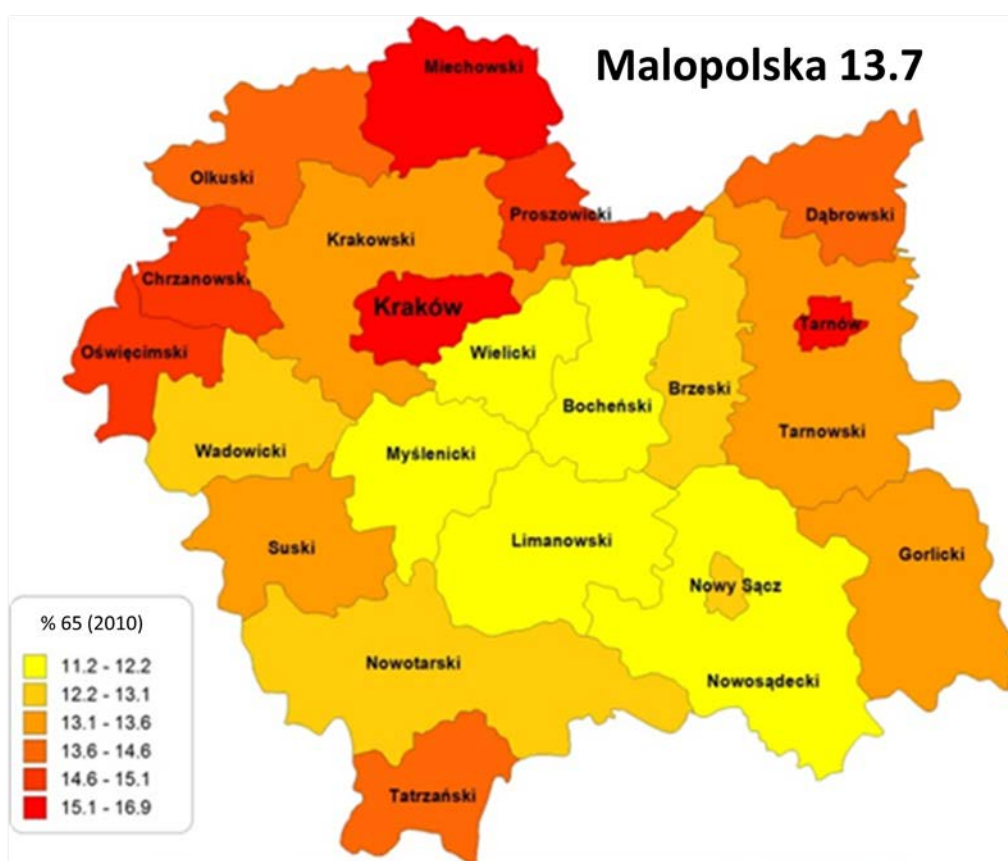
As with other demographic factors, the population age structure **varies spatially** (Figure 8 and Figure 9). The youngest age groups are in the southern areas of the region, where the share of the older population is below 14% (poviats Nowosądecki, Limanowski and Myślenicki). The largest shares of the population aged 65+ are in the municipalities (gminas) of Miechów (20.3%), Kraków (19.4%), and Tarnów (18.7%). Differences among sub-regions, powiats and gminas are again mostly influenced by fertility rates, which in the southern part of the region were and still are much higher than in the northern part of the region and in Kraków city. The higher fertility rate of the southern powiats can be explained by several factors. Firstly, cultural and traditional factors can play a significant role, with the traditional family model of the male breadwinner and the woman raising the children and keeping house being dominant in the region. In comparison to this, especially in the western part of the region, where it is much more industrialised, women were and still are much more active in the labour market. This family model is actually historically more typical for Poland, with dual male and female breadwinners, and the women also

taking care of both house and children. The family model in Poland could thus be historically characterised as having a high female employment rate, and with women taking responsibility for housework and care duties (Styrc and Matysiak, 2012). Women in Poland were able to work full-time because there were help systems for their care responsibilities, either more formal external care in the form of crèches or kindergartens; or in an informal way, with support from grandmothers, and other family members, or from nannies. Currently, the need for full-time external care is increasing, due to changing and more demanding organization of work time, which is less sympathetic to reconciliation of work and care requirements.



**Figure 10 Percentage share of people aged 65+ in 1995**

*Source:* Central Statistical Office of Poland, 2012.



**Figure 11 Percentage share of people aged 65+ in 2010**

Source: Central Statistical Office of Poland, 2012.

## 2.2. Socio-economic characteristics and labour markets<sup>6</sup>

### 2.2.1 Economy

The Małopolska region is one of the most economically diversified regions in Poland, with a high share of industry and construction organisations. Recently, there has been an increase in the number of new, technologically advanced sectors, however, the traditional sectors remain dominant, i.e. the steel, chemical, mining, metal, tobacco and food industries.

In 1995, the Małopolska region generated 7.2% of the Polish gross domestic product (GDP), and in 2008 this was 7.45 (OECD StatsExtracts <http://stats.oecd.org/Index.aspx>). In 1995, the GDP of Małopolska equalled \$6.5 billion US dollars (current purchasing power parity - PPP, current prices), while in 2008 it amounted to \$14 billion. Taking inflation into account (constant PPP, constant real prices from the year 2000), the region's GDP equalled \$7 billion in 1995 and \$11.8 billion in 2008. In 1995, Małopolska's GDP per capita equalled \$2 052 (\$2 340 in Poland) and about \$4 262 in 2008 (compared to \$4 930 in Poland; current PPP, current prices).

<sup>6</sup> Refer to the information about labour market from the annual report about the Małopolska 2011 written in this report by: Aneta Okońska, Agnieszka Słobodzian, Katarzyna Cylic-Nawałka, Antonina Michalska, Maria Leńczuk and about business by Agnieszka Górniak, Rafał Poniewski, Elżbieta Sztorc, Marcin Wątor.

The measurement of economic growth by the change in gross value added (GVA), expressed in constant prices, shows that the GVA dropped by 5% in 2008 compared to 1995 in agriculture, forestry and fishery, while other branches experienced the following growth rates: mining and utilities – 85%; construction – 38%; wholesale and retail, vehicle and other goods’ repairs, hotels and restaurants, transport, storage of goods, and communication – 74%; finance, real estate and entrepreneurial activities – 94%; public service – 22%. From 1995 to 2008, the Małopolska voivodeship’s overall GVA grew by 62% (compared to 58.5% in Poland) (OECD, 2012).

Between 1995 and 2009 the actual (constant PPP, constant real prices) primary income of private households in the region grew by 41%. In the same period, the disposable income of private households grew by 37%.

The innovation development of the region, as stated by research and development (R&D) expenditure across all sectors (as a percentage of GDP) grew from 0.80 in 2000 to 0.92 in 2008 (which is much higher than the Polish level of 0.567). The percentage share of persons employed in all R&D sectors went from 1.16% in 2000 to 1.033% in 2008. At the same time, the number of applications per 1 million inhabitants in the year 2000 was 1.46, while in 2008 it was 3.62 (OECD, 2012). Examples of major businesses based in Małopolska and Kraków are presented in Box 1.

#### **Box 1 Business in Małopolska and in Kraków – new perspectives**

In Kraków in 2012 there are over 65 centres of outsourcing, IT and shared services, employing over 25 000 people. There were 15 new projects planned up to the end of 2012. The city is rated first among emerging cities in the location category of the BPO/SSC “Annual Global Services and Tholons Top 100 Outsourcing Ranking 2010” and managed to surpass such cities as Shanghai, Prague, Budapest and Brno.

Over 60 global giants have already chosen to place their investments here, including: MAN trucks (automotive sector, Germany), NIDEC (automotive, electronic, Japan), TRI GRANIT (retail, office space), CAPGEMINI (BPO, IT, France), SHELL (SSC, The Netherlands), ERICPOL TELECOM and LUXOFT (Polish IT sector), ARCELOR MITTAL (Metallurgy, India/USA), Motorola (IT, USA). Additionally, other Polish companies located in Kraków include COMARCH (IT sector), as well as the headquarters of ONET and Interia, which are two Polish Internet companies.

The Business in Małopolska Centre (BiMC) is a one-of-its-kind initiative in Poland, with the goals of improving services for investors and exporters and of promoting the region’s economy. The Centre is composed of the institution for regional development – Małopolska Regional Development Agency S.A., the local self-government – the Małopolska Province Marshall’s Office, and one of the most important institutions supporting foreign direct investment – Kraków Technological Park Sp. z o.o.

Source: <http://www.businessinmalopolska.com/aktualnosci/krakow-the-capital-of-bpo> [14.10.2012]

#### **2.2.2 Labour market**

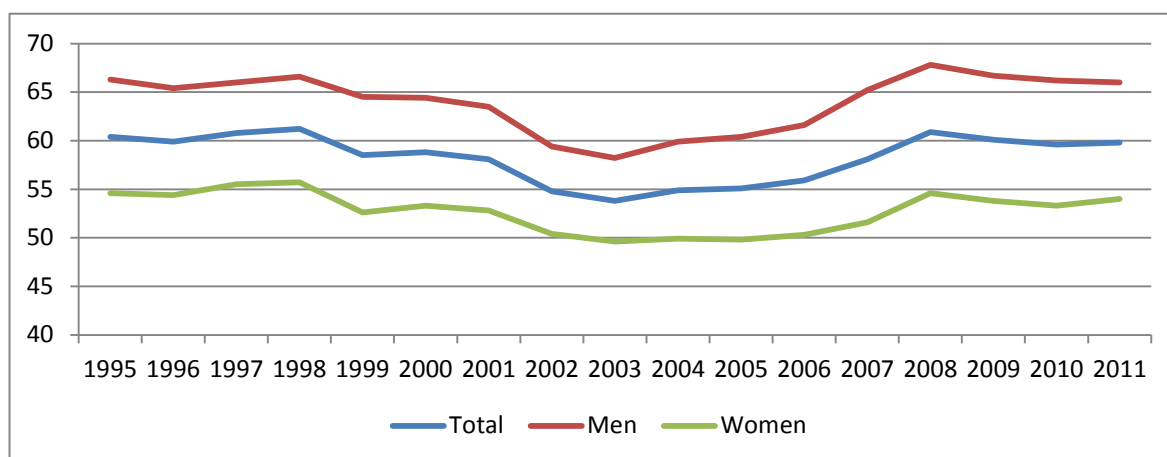
In 2010, Małopolska had an employment rate of 50.1%<sup>7</sup> which ranked it seventh in Poland (in line with the Świętokrzyskie province). Average employment levels have been increasing since the lowest employment levels were reached in 2003, which was the year with the lowest levels also recorded for the rest of the country. In the year 2010, average employment in the enterprise sector amounted to 412 100

<sup>7</sup> The employment rate of the working population as a share of the total population aged 14+. Additionally, the percentage share of people employed within the working/productive population, which in Poland is ages 18-64 years for men and for women ages 18-59 years. This indicator in 2010 was approximately 65.1% and the employment rate for people aged 15-64 in 2010 in Małopolska was 59.6%.



people, of which the public sector employed 44 400 (annual decrease of 4.6%), and the private sector, 367 600 people (an increase of 1.9% compared to 2009).

The employment rate for people aged 15-64 decreased to 2003, when it reached its lowest point, and then increased to 2008 (Figure 10). Due to the economic slowdown in 2009, this trend was again reversed, and since then the indicator continues to fluctuate around the 60% mark for Małopolska. Thus, for a few years, the gap between Małopolska and the rest of Poland was almost negligible.



**Figure 12 Employment rate (people aged 15-64) in Małopolska, 1995-2010**

Source: Central Statistical Office of Poland, 2012.

In terms of gender rates within the labour market, the situation shows a clear pattern of much lower employment of women over time (about 10-12% lower for women compared to men), it is mostly related to a lower eligible retirement age threshold for women (60) than for men (65), but women also have more breaks in their work career due to family duties.

The voivodship is characterised by a relatively highly educated workforce. In 2010, the share of workers with higher education or secondary education backgrounds continued to increase. Meanwhile, the share of workers with a vocational education has decreased (Table 1). In 2010, the largest group of workers was specialists, though their number was decreasing. In this group, nearly two thirds were women. The second largest group consisted of industrial workers and artisans (91.2% of this group were male), and the third farmers, gardeners, foresters and fishermen (no prevalence of either gender).

**Table 1 The education level of people aged 15-64 in Małopolska**

	1999	2005	2010	2011
<i>Tertiary</i>	10.8	13.7	19.8	21.0
<i>Post-secondary</i>	24.7	23.8	24.2	23.5
<i>Secondary</i>	8.7	11.5	12.8	12.0
<i>Vocational</i>	31.3	30.1	27.6	27.6
<i>Gymnasium, primary</i>	24.5	20.9	15.6	15.9

Source: Central Statistical Office, 2012

In Małopolska in 2010, compared to the previous year, the total share of working people decreased, due to a decline in the number of workers in industrial and agricultural sectors, whereas the share (and number) employed in the services industry has increased.

From 2009 to 2010, the number of unemployed people registered with district labour offices increased (up 9.4% from 130 007 in 2009 to 142 221). District labour offices' records noted an increase in the share of women and long-term unemployed. The group of long-term unemployed includes, among others, people who have lost their jobs due to the economic slowdown in 2009 and have not yet found a job.

At the end of 2010, in the register, there were 331 363 entities (including 253 200 self-employed individuals), which represents 8.5% of total entities registered in Poland. Małopolska is ranked fourth among all regions in the country in terms of the number of registered businesses. The private sector had 323 300 companies (97.6% of the total), and the public sector had 8 000 (2.4% of the total). Mostly, these were small firms, micro-businesses of up to 9 employees (314 000), with only 375 large companies with over 250 employees in Małopolska, of which, 209 were in the city of Kraków. The Małopolska region is dominated by SMEs, which are more susceptible to the changing economic environment.

Predominating company types are trade and repair of motor vehicles (90 000), construction (44 300), manufacturing (33 200) and professional, scientific and technical (28 100). Most companies are registered in Kraków (115 000). The lowest number of businesses was reported in poviats: Dąbrowski Proszowice and Miechów. The most dynamic growth in the number of companies over the previous year was recorded in the poviats of: Tarnów, Limanowa, Kraków and Wieliczka (8.2%). **On average, for Małopolska, for every 1 000 people there are 100 businesses.** The growth rate over recent years is presented in Table 2. The highest rate was recorded in Kraków (153 companies) and the Tatra district/powiat (148) and lowest in districts/poviats: Tarnów (53) and Dąbrowski (50).

**Table 2 Number of businesses per 10 000 inhabitants in Małopolska, 2002-2010**

2002	2003	2004	2005	2006	2007	2008	2009	2010
859	885	886	887	885	896	917	952	1001

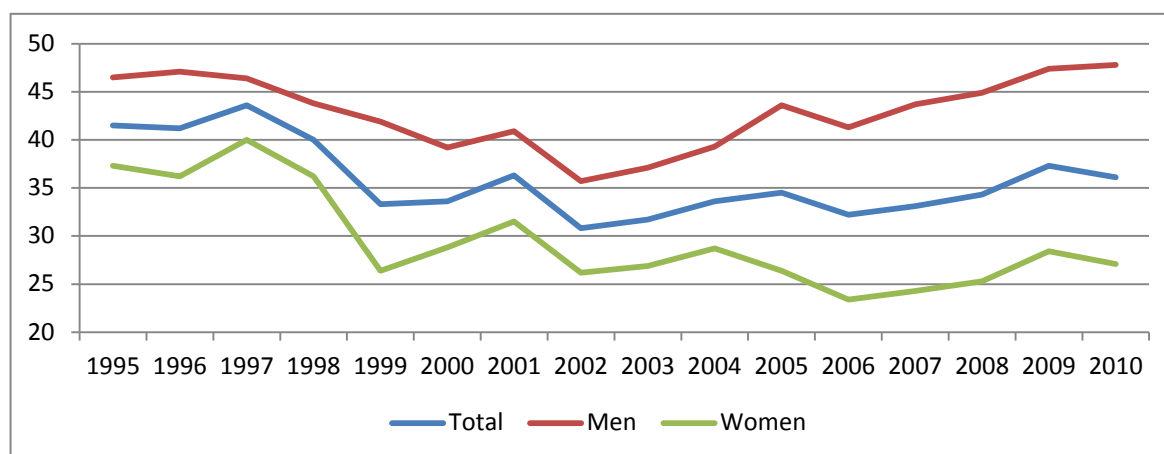
Source: Marshall's Office of Małopolska/Central Statistical Office 2012.

In 2010, in the Małopolska province, 36 400 new businesses were recorded. The following industry sectors experienced increases: trade, repair of motor vehicles, construction, professional, scientific and technical activities. However, 19 300 businesses were closed in 2009. Company stability indicator (the ratio of closed businesses to start-ups) in the Małopolska province was 53%, which decreased by 8 percentage points compared to 2009. This means there is an increasing prevalence of newly-registered companies.

## CHAPTER 3 OLDER WORKERS; SILVER ECONOMY AND WHITE ECONOMY

### 3.1 Older workers

In general, the employment rate of older workers (55+) in Poland is generally low; in 2011, it was around 37%. In Małopolska, the employment rate of older workers aged 55-64 in 2010 was 47.8% for men and 27.1% for women (Figure 13). The overall employment rate of workers aged 65+ in 2010 in Małopolska was 6.9%, while for men it was 10% and for women, 5%.



**Figure 13 Employment rate of older workers in Małopolska, 1995-2010**

Source: Central Statistical Office of Poland, 2012.

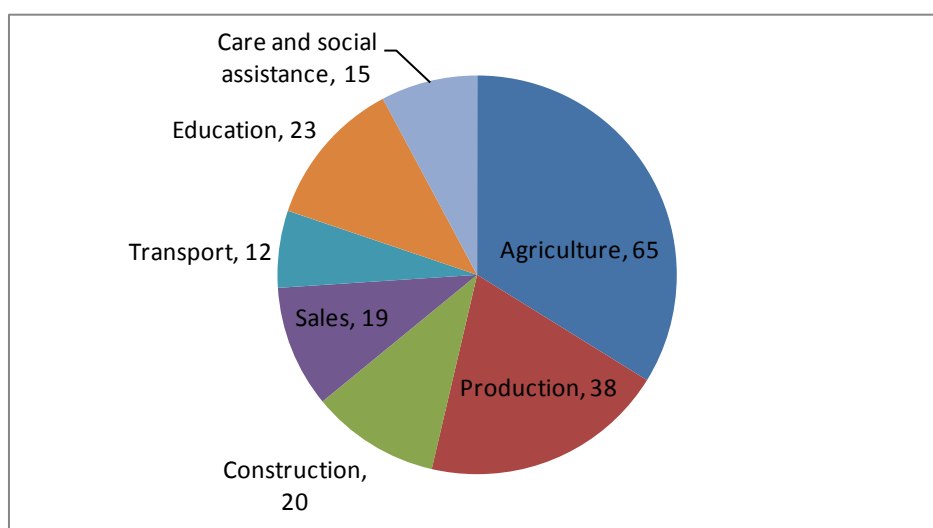
The debate and actions related to the consequences of an ageing workforce have changed significantly since Poland joined the European Union (EU) in 2004<sup>1</sup>. The EU funds enabled various investments, projects and programmes, while EU priorities influenced the direction of those actions. In the Małopolska region, engagement of older generations was in line with some programmes suggested at the national level, for example, Hausner's Plan, 2003/2004 and later the "Solidarity across generations" project in 2008 (Solidarność Pokoleń). The programme was a package of measures directed at increasing the employment and economic activity of people over 50 (in some cases over 45), and better utilisation of their human capital. The proposals from this programme, besides changes in legislative regulations, include liquidation of some labour costs for employers employing workers of pre-retirement age, and implementation of bridging pensions<sup>2</sup> in place of early retirement options, which were introduced in 2009.

<sup>1</sup> More information is available in "Did the transition to a market economy and the EU membership have an impact on active ageing policy in Poland?" A. Ruzik-Sierdzińska and K. Turek in *The Making of Aging Policy: Theory and Practice in Europe*, editors R. Ervik, T. Linden, Edward Elgar Press (forthcoming).

<sup>2</sup> The 1999 pension reform assumed that all pension privileges (lower retirement age or more favourable rules for calculating benefits for certain groups of insured people) would exist only in the voluntary and additionally financed 3<sup>rd</sup> pillar. That idea was rejected by the trade unions. Instead, the government proposed so-called "bridging pensions".

Nevertheless, the effectiveness (especially the net effect) of the whole programme is still difficult to assess. The actions undertaken were mostly legislative in character and their results may not be clearly visible after such a short period (Szukalski, 2008).

At the regional level, there were a number of projects that supported the employability of older workers and help for unemployed people aged 45+. The more detailed analysis is not provided here, but between 2007 and 2009, there were 26 projects aimed at people aged 45+ carried out under the Operation of Human Capital Programme (see, Raport z analizy programów skierowanych do osób 50+, 2011). However, according to the Central Statistical Office of Poland, based on reports by the Ministry of Labour and Social Policy in the Active Labour Market Policy, for unemployed people aged 50+, as at 31 December 2009, there were a total of three people employed in training activities, 251 employed in intervention works, 34 employed in public works and 34 employed in social utility works in Małopolska (see *Osoby powyżej 50.roku życia na rynku pracy w 2009 r.*, GUS, 2010). A more detailed presentation of those aged 50+ in the labour market in Małopolska are shown in Figure 14 and Annex 1. Annex 1 includes detailed statistics, including for employees aged 50+ by selected professions, which indicated that the majority of employees aged 50+ are farmers and related workers, followed by experts, professionals and craftsmen. Detail is also included for employees aged 50+ by sectors, self-employed and working family member by gender; and employees 50+ by education level, with the majority achieving high education levels followed by post-secondary and secondary vocational.



**Figure 14 Employees aged 50+ by selected sectors of the Polish Classification of Activity in Małopolska in the fourth quarter of 2009 (in thousands)**

Source: *Osoby powyżej 50.roku życia na rynku pracy w 2009 r.*, GUS, 2010 (*People over 50 years of age in the labour market in 2009*), Central Statistical Office of Poland).

Persons working in agriculture are active until a relatively old age, usually within seasonal, part-time and low productivity work. The separate pension system for farmers has the same retirement age as in

The government proposal was negotiated with trade unions and representations of employers (that slowly started to be more involved in the pension debates), but at that time they did not reach agreement on which professional groups should be covered by the new reform. The bridging pensions are offered to about 270 000 employees, performing one of about 60 listed types of work under special conditions (estimation). The list to some extent was a subject of discussions and bargaining between trade unions, employers and the government. It took a decade to introduce the law on bridging pensions, and it was implemented between 2008 and 2009, replacing the majority of the privileges of early retirement.

the main retirement system, but still with the PAYG<sup>3</sup> defined benefit rule. Farmers were exempted from the reformed social security system in 1999. The main issue is not the extension of the labour market participation rate at an older age, but the higher participation of the payers to the system (contributors). Currently, less than 10% of social security benefits for farmers are financed from their contributions, the rest is covered from general taxes. Even farmers with high revenues pay much lower contributions than people working in services or industry areas. In Małopolska, over the past decade there has been a decrease in the number of pensioners from the farmer system (from about 140 000 in 1999/2000 to about 100 000 in 2010). This has been a general trend across all of Poland due to changes in Polish rural areas such as concentrations of rural areas, and fewer farmers. As a result, the agricultural sector is getting smaller, a trend which is also evident in Małopolska. Additionally, within the agricultural pension system (social insurance fund) the majority of people are over 75+. In 2010 in Poland, there were approximately one million old-age pensioners in this fund, and almost 600 000 of them were aged 75+ (see Emerytura i renty, 2010).

To prolong the professional life and increase the employment of older generations, employers have to be willing to hire older workers and to utilise their work in a productive way. Age management in Poland exists within a very limited scope and what are called age management policies are often simply a relabelled version of previously existing human resources policies (Urbaniak 2007, MPiPS, 2008; Zięba, Szuwarzyński, 2008). Measures aimed at older workers and at the ageing workforce are very seldom implemented as part of a broader, longitudinal strategy of human resources management including such facets as training programmes and ergonomic solutions. Analysis of age management practices within the Activating Seniors' Potentials in an Ageing Europe (ASPA<sup>4</sup>) project showed that a relatively small number of companies have developed measures actively supporting older workers (Perek-Białas, Turek, 2010). One such innovative example is shown in Box 2.

### Box 2 Age management practices

A recent example of an innovative age management practice is the nationwide project from the Academy of Development of Philanthropy in Poland, called 'Profit 50+', which is a nationwide competition for employers who promote age friendly strategies and actions. Since 2009, more than a dozen companies that have implemented age management programmes have been awarded recognition. Among these is a company from Kraków in the Małopolska region, **EMITel**, which has a high share of older workers, and seeks to increase motivation to work and to improve relations between workers of different ages, and to utilise older workers' knowledge and limit the costs of external training. The HR department developed a special programme designed to ensure older workers play an active role in the company, by means such as giving them new work roles as coaches, trainers and experts for other colleagues, and developing means of sharing their knowledge with others in a formal way.

*Source:* Academy of Development of Philanthropy in Poland and *Activating Seniors' Potentials in an Ageing Europe* project (7 FP UE).

Age discrimination is another important issue which needs to be highlighted. The problem is not the lack of anti-age discrimination legislation, but in its utilisation and execution (Szatur-Jaworska 2008). Discrimination may be observed in recruitment (with age being considered a very important factor), training strategies (more training is provided for younger workers), promotion, and the atmosphere at work. Changes towards older workers in Poland as a whole, not only in Małopolska, are required firstly in the field of education, then in promotion of positive attitudes, and appropriate organisation of workplaces, so they are adjusted to enable the abilities and needs of the older worker (Perek-Białas, 2007).

<sup>3</sup> PAYG – Pay as You Go

<sup>4</sup> ASPA Project under the 7<sup>th</sup> Framework Programme of the UE on *Activating Seniors' Potentials in an Ageing Europe* 2008-1. The project involved eight countries: The United Kingdom, Germany, France, Poland, Sweden, Denmark, Italy and the Netherlands. Details at: [www.aspa-eu.com](http://www.aspa-eu.com)

The situation of the older workers in the region was discussed with various stakeholders during the OECD visit to Kraków in March 2012 (detail in Annex 2). Comments were made as to why the overall situation in the labour market is not favourable for older workers and why the employment rate of older workers is low (refer Box 3). One obvious comment is that there are fewer jobs available; there is high unemployment even among the young. Additionally, there are many pre-retirement options for certain professions, which influences the low work activity levels of older people, not only in Małopolska, but in Poland in general.

Employers also usually consider older employees as less productive and more expensive compared to the younger ones. Older workers are in general less educated than their younger counterparts, and can also be reluctant or slower to adapt to changes, therefore, undertaking retirement is considered to be an optimal solution for older workers who can be pensioners and still undertake some work.

Moreover, the participants agreed that the situation is different when someone is already employed and the need is to maintain such a person in employment for as long as possible, compared to when someone is trying to find a new job in old age. In the first situation, keeping the older workers may be more profitable (older workers are more loyal), but on the other hand, employers usually think about potential additional costs (such as sick leave). Usually, it is more profitable to employ younger graduates than older people, even if the older people update their skills via additional courses, or special training etc. The situation also differs between small and large companies, as smaller ones are more likely to attempt to retain older qualified employees, while in larger companies, younger staff are more attractive, as the most important consideration is the productivity that allows the company to be competitive, operating within a global market.

In general, there are a lot of negative stereotypes about older workers and older people. They are perceived as having poorer health, low competences, low mobility, and lower qualifications. They are seen as being afraid of changes, unable to update their education and their skills. However, as was noted, many of these stereotypes are not true, as demonstrated by the fact that there is actual evidence that older workers take more sick leave than other workers. Also, older workers are more loyal, and such persons also provide more stable human resources for companies. Some customers actually prefer dealing with more experienced older staff.

According to our workshop members, a proper management culture is lacking in many organisations, including age management measures such as mentoring and coaching, in which the older workers could act as teachers for practical issues. However, incentives are needed for older workers and companies, in order to interest them in measures intended to foster an intergenerational exchange of knowledge and experience between younger and older staff (measures could include tax relief, lower labour costs through reduced contributions, some additional subsidies for the company if they apply certain measures etc.).

The participants agree that there is a lack of coherent and stable policy within the state government towards older workers. Changes in laws also play a crucial role, as the insecurity of planned and possible changes in areas such as the pension system, are an additional risk for employees and employers alike, and do not dispose companies to organise work for older persons.

The current actions are ad hoc only, and there is a need to change or adjust laws to create financial incentives to work longer in areas such as the pension system and the labour market regulations, both for employees and for employers. There is a lack of institutions in which older workers can find information on employment opportunities. Some older people are active, but there is a general lack of support for better orientation towards labour market possibilities.

The regulation requiring four years of protection for older workers was discussed, as it is perceived as being problematic. Employers would like to limit and/or stop this option. On the other hand, employees prefer to have such a right, as people are often dismissed before this period and then it is very difficult for older unemployed people to find a job. However, many said that both employers and employees do not benefit from this employment protection scheme.

### Box 3 Some emerging themes regarding the situation of older workers in the labour market

#### *Required actions:*

- To increase awareness of ageing society among employees and employers
- To promote actions and programmes/projects which aim to eliminate negative stereotypes about older workers.
- To promote such measures at the company level which, when implemented, in the long-run, will provide solutions intended to support different generations (older to younger and younger to older).
- To arrange training and skill development programmes and projects that are adjusted to older people's needs, wishes and abilities (physical and mental), based on individual approaches. This needs to be done with an in-depth understanding of the target group, which necessitates a change in perspective away from the current focus on training alone for those aged 50+ and those who, by age, are qualified for a specific project, but to consider:
  - older employees (55+) from a specific sector, who are at risk of exclusion from the labour market, and to therefore offer them the most effective way of updating their skills; and
  - older unemployed people, utilising the tested and implemented systems utilised in Social Integration Clubs.
- To think strategically not only at the regional level, but also at the poviát and gmina levels. This is a crucial step in the process, and includes consideration and development of not only existing strategic documents, but also preparation of new and different strategies (negative, neutral and optimistic), with cost-benefit analyses done for considerations of both implementation or no action being undertaken. As an example, the question could be asked: What will happen in the place X if there are less children (about 50%) in 10 years, in 20 years and in 30 years? What kind of impact will there be on the community?
- To include and engage local communities, so that they are aware of the demographic changes.

Source: OECD Kraków Workshop Focus Group

## 3.2 The silver and white economy

### *Silver economy*

The silver economy can be analysed through investigation of the labour market participation of persons aged 65+, as well as by looking at the value of the sector(s) of goods and services that are focused on older people. Almost all people aged 65+ in Poland are retired, due to the fact that the eligible retirement age had been set at age 60 for women and 65 for men. However, the employment rate of those aged 65+ for Małopolska was about 10% in the years 2002 to 2004. After 2007, the indicator decreased to about 5% in 2008 and 2009. This could be the result of changes in retirement policy<sup>5</sup>, combined with set

<sup>5</sup> Besides increasing the retirement age in 2012, there have also been other policy changes, such as the regulation brought in by the Ministry of Labour and Social Policy, which requires everyone of retirement age to seek their employer's permission to continue working. In many cases, women aged 60+ and men aged 65+ have difficulties returning to work, as employers are not required to continue their work contracts any longer. Since 1 January 2011, a law has been in place requiring job contracts to be dissolved before people can receive pension benefits (refer Social Insurance Institution - ZUS). National laws regarding combining work and receiving the old-age pension have changed often in Poland. For example, since 1 January 2009, it was possible to both work and receive a pension, due

age limits in some professions, and it is safe to assume that the economic slowdown also had an impact. The indicator was 7% in 2011, and while this is still much lower than the 2002 rate, it is still above the national average. Many retirees (not only in Małopolska) are active in the labour market, including helping in the family business, which is particularly common in the tourist-oriented areas of the region. It is quite difficult to measure the true amount of this work through statistics, as it is often not officially registered employment. It can therefore be assumed that the contribution of older people to the economic performance of the Małopolska region is actually much larger than official figures indicate, but accurate estimates are currently unavailable.

An estimate of the silver sector's economic effect, through calculations of the value of the market for goods and services for older people in the region, also requires additional analysis. The first stages of this analysis have been undertaken within the publication, "Challenges of the Małopolska region" (2010), which is described later in this report. It is worth noting that Małopolska has more health resorts and spas than other regions, which are important attributes for developing the silver economy.

#### *White economy*

The number of public and non-public hospital beds at the end of 2010 was 53.3 per 10 000 persons within the region, including short-term beds (32.9 per 10 000 residents), and long-term beds (15.4 per 10 000 residents), and psychiatric beds (5.0 per 10 000 residents). When compared to data from 2005, with 42.6 hospitals beds per 10 000 persons, an increase is observed (Central Statistical Office, 2012). Employment of medical staff in hospitals at the end of 2010 totalled 19 234.63; among regional hospitals there was a total of 7 133.47 employees and in the district/powiat level hospitals, 12 101.16 were employed. There were on average 2 physicians per 1 000 inhabitants in Małopolska in 2010 (a figure that has remained constant over the past 10 years).

Even though the number of hospitals and spa resorts in Małopolska between 1999 and 2009 decreased from 56 in 1999 to 42 institutions in 2009, it is still a significant player in this field. The decrease can be partly explained by the transformations in the spa treatment facilities carried out in the analysed period. The majority of the units are now private health care facilities and often attract older tourists, thereby creating a potential market for the silver economy – refer *Challenges of the Małopolska region* (2010). According to this study, Małopolska has the second highest number of spas after Dolny Śląsk. In the Dolnośląskie voivodeship, there are 11 towns considered to have spa status, compared to 9 towns in Małopolska, but it should be noted that there are towns without the spa status, but which have spa facilities, and which are used for this purpose (for example, Wieliczka and Bochnia). One of the conclusions within *The Challenges of the Małopolska region* report (2010) was that, all in all, the resources of spas and towns with health benefits in Małopolska are under-utilised. Some of the regions in Poland, which actually have far less resources, do this much more dynamically.

Because it concerns the white sector, it is worth noting that in Małopolska there were 36 geriatricians, 7 geriatric centres and 73 geriatrician beds, according to estimates by Dubiel and Klich-Raczka (2011) at the end of 2010, which are definitely not enough. Compared to other regions, of which only Śląskie is in a better position, the situation is not as dramatic as it is in the rest of the country. At the regional level, the programmes for health prevention, including promoting an active and healthy life, were included in the Małopolska "Programme of Health Prevention" in 2006-2013 (Małopolski Programme Ochrony Zdrowia na lata, 2006-2013) ([www.malopolskie.pl](http://www.malopolskie.pl)).

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to claims that otherwise there was a barrier to employment of older people. Then in 2010, there were again plans to change this regulation. Sudden decreases in 2007 in Poland and other regions regarding retirement statistics reveal changes in national policy rather than regional policy.



Older people could be an important resource for Małopolska. Box 4 describes the case of a non-government organisation located in Kraków, *Stowarzyszenie Lekarzy Nadziei* [The Association of Doctors of Hope], which, thanks to the project *Transfery* [Transfers], managed to establish intergenerational collaboration through the white economy.

**Box 4 An example of intergenerational collaboration via an NGO and the health sector Stowarzyszenie Lekarzy Nadziei (Kraków) - SLN**

The main two voluntary activities in which SLN attempted to engage older people were:

- Medical volunteering – this involves mostly retired medical doctors, chemists and nurses. SLN attempts to attract these people to work in clinics for homeless people, pharmacies and for a drug magazine. The clinic provides multidisciplinary medical examinations, treatment (within available resources), prevention of addictions, minor surgery and dressings. The clinic employs: one doctor, 3 nurses, a psychologist, and a medical assistant - all part-time. In addition, medical duties are carried out by 10-12 volunteer physicians. Members of the ward also participate in humanitarian missions abroad e.g. for refugees, the disabled, and promoting health in schools.
- Motivation of homeless people (mostly older men and women) – mobilisation of homeless patients and wards to take care of their health, to begin work or other kinds of activity. SLN provides, in addition to medical services, initial help and support (including information, psychological consultations).

The project of SLN is called the “Transfery” (Transfers) – medical volunteering for senior physicians who have been awarded a place in a national contest related to developing solidarity across generations. This project attempted to promote the voluntary engagement of retired doctors. SLN decided to interest senior physicians in volunteering in a clinic for the homeless and the poor, run by the SLN. The inclusion of senior doctors in the clinic has allowed intergenerational co-operation and an exchange of experiences with young doctors and medical students. In the course of the project, intensive information campaigns had to be carried out, targeted at older physicians. A consultation point was launched for people interested in volunteering. Doctors who decided to volunteer were introduced to their duties, and received the support of SLN.

Source: <http://www.lekarzenadziei.krakow.pl/> [25.03.2012].

However, perceiving and so developing the economy towards a focus on the “silver”, “white” and “green” economies is still new and a not well-recognised nor accepted concept by participants of the workshops. The silver economy can foster the development of services and products for older generations not only in the white sector (hospital/elderly care), but also in the green economy (tourism, ecological/green initiatives), in education, and other fields (such as culture). The silver economy can create a new style of life, through measures including new technologies and a service sector for older generations such as law, financial services, and psychological advice etc.).

The development of the silver and white economies, however, have to be connected with the urgent need for adequate education and training in these sectors, and with the promotion of new jobs such as telemedicine, tele-rehabilitation and home care services, as there are still not enough qualified staff within the white sector. In addition to this, the staff already working in the white sector are under pressure; physically overburdened, and poorly paid.

**Box 5 Silver and white economy emerging themes**

- There is a need to differentiate between the levels of ‘older’, ‘elderly’ and ‘aged’, as their needs are also different:
  - 55+ older/senior worker

- 65-75 younger elderly
- 75-89 elderly
- 90+ senior elderly/aged
- There is a need to support the development of the *silver* economy; new financial instruments are needed to encourage entrepreneurship among older workers and the younger elderly. New professions can also be developed such as ‘assistants for cultural advice’ or ‘assistant to the elderly’, to provide flexible solutions for elderly people. The silver economy could act as an umbrella strategy for engaging elderly people.
- There is a need to support the development of the *white* economy; with new professions needed for the management of disabilities, diabetes, hypertension, smoking and mental health issues. The new health professions are fundamentally different from the mainstream healthcare focus on ‘curing’ the patient. In an ageing society, the focus needs to be shifted to ‘management of symptoms’ and management of the variability of symptoms. For example, more professionals are needed to develop monitoring systems and procedures for caring at home and also to be connected to rehabilitation or the use of telemedicine, which could be significantly expanded. Motivating health professionals to invest in their careers and to innovate is a significant challenge in the nursing area alone. There is also a generation gap in certain professions and a lack of adjustment in the sector, which is already leading to a difficult scenario within the ageing region.

**Actions:**

- To finance projects, especially at the local levels (gminas), which are far from the medical facilities of the city centres, to test the advantages of telemedicine and telecare. The aim would be to support those who live alone and those who cannot care for older family members due to considerations such as work constraints (as recommended in the report, “Challenges of the Małopolska Region”, 2010).
- To test if such solutions could be organised in collaboration and with the joint responsibility of different actors (eg. the Gmina’s Centre of Social Policy, local health centres, private organisations, family and caregivers).
- To show the advantages of linking the silver, white and green economies as an opportunity resulting from population ageing; and to support the development of the *green* economy, where recycling and waste treatment in hospitals could be optimised. Also, connecting with tourism and leisure, to offer quality and healthy services to the silver customer. As an example of a concrete recommendation, projects/programmes for medical institutions such as hospitals or social assistance housing, could be encouraged to apply for environmentally friendly infrastructure, which would allow them to better manage their recycling and waste treatment. The cost-benefit analysis of this change would obviously need to be well done, and compared with the overall impact (for institution itself and for environment).

*Source:* OECD Kraków workshop based on comments from Focus Group Workshop No. 2 (Wawel Castle, Kraków, March 2012).

## CHAPTER 4 SKILLS AND TRAINING ECOSYSTEM<sup>1</sup>

In 2010, there were 33 universities/colleges in Małopolska, with 211 938 people enrolled across the academic year 2010/2011, 111 people less than in the previous year. For the first time since the boom in higher education, the growth trend in the absolute number of students declined in the region (this phenomenon has existed since 2005 across Poland as a whole). Due to the decreasing younger population over the coming years, fewer and fewer people will study in Małopolska, which will have a slight impact on the region. In 2010, the index of the number of students per 10 000 inhabitants indicated that Małopolska is the most academic region in Poland. In 2002, there were 509 students per 10 000 inhabitants, in 2009 it was 643, and in 2010 it was 640 (the first year that showed a drop in numbers in the region).

Małopolskan universities and in fact the whole region, especially Kraków and its economy, are heavily dependent on students living in the city. The number of students from abroad continues to increase: in the academic year 2010/2011, 2.3 thousand foreigners studied in Małopolska, which was just over 1% of all students, but a figure that was 15.4% more than in the previous year. The most popular university in this regard is Jagiellonian University (which is made up of 56% foreign students), due to the medical faculty, at which 619 people study (26.9% of the total number of foreigners).

The vocational school system operates within upper secondary education. In Małopolska, there are 311 schools of various types that offer training in 119 different occupations (Tendencje, 2012). Małopolska has for several years been at the forefront of the provinces achieving the highest results in the Polish professional examinations.

The life-long learning system is still being developed in Poland. If older people wish to improve their labour market situation, they will have to participate more in the various educational initiatives available to them. The adult participation training<sup>2</sup> rate in Małopolska is very low, currently less than 5% (CSO, 2012). In 2007-2008, regional authorities implemented a special programme (a joint initiative by the Regional Labour Office with various educational and business partners, called Małopolska's Regional Partnership for Life-long Learning), which aimed to increase the participation in life-long learning over the entire lifespan of all inhabitants within Małopolska and to monitor the participation of people living in the region, as well as the activity of educational institutions in this field. The follow up to this project is described in Box 6.

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<sup>1</sup> Skill ecosystem - self-sustaining concentrations of workforce skills and knowledge in an industry or a region, through public funded training and knowledge transfer (Finegold, 1999). Such strategies involve not only education and training institutions, but also a wider range of stakeholders, including firms, employer associations, economic-development agencies, employment agencies, trade unions, and non-profit organisations, which can work together to develop skills and training ecosystems (Martinez-Fernandez and Weyman, 2011).

<sup>2</sup> Depending on the definition used, the level of this indicator can fluctuate - (previous year's figures used a different definition, which meant that participation rates appeared to be higher. (Based on results from *Balance of the Human Capital*, 1<sup>st</sup> edition, 2011).

**Box 6 The Małopolska Partnership of Labour Market, Education and Training Institutions**

The project goal is to promote life-long learning in the region through the involvement of various institutional partners (currently 111 institutions are active in this Partnership), to support citizens of the region with their personal and professional development. Primary aims of the projects are: 1) support for life-long learning policy in the region; 2) development of institutional co-operation in the field of education, training and employment; and 3) dissemination of life-long learning benefits.

Under the project, actions include aiming to establish a coherent and transparent system of training services' quality (Małopolskie Standardy Usług Edukacyjno-Szkoleniowych). This innovative tool will help to ensure good quality standards of education in the region. There are several actions which are followed under this comprehensive activity, such as: regular partner meetings; annual conferences including "Małopolska opens for knowledge"; and a contest for the best "Educational Gmina of Małopolska" (for children and pupils of primary and secondary schools, as well as inhabitants of those gminas which promote their development). In 2010, the "Małopolski pociąg do kariery" – special web page, with news related to life-long learning, activities, projects and other important information was launched. This also included options for receiving advice about possible career development. Since 2011, in June every year the "Małopolski's Day of Learning" event is run, to promote the idea of development and responsibility for one's own learning among the citizens, through the slogan „Discover your passion – enjoy it!”. During this day, citizens are able to test out various forms of learning for free, by participation in lectures, seminars, and workshops prepared by various institutions. Currently, the project is designed to run until March 2013, and is financed from the framework of activity 6.1.1, the *Operational Programme Human Capital of the European Social Fund*. The financing is composed of the following resources: European Social Fund (85%) and national funding (15%).

Source: [www.pociagdokariery.pl](http://www.pociagdokariery.pl)

In the field of education for seniors (mostly retirees), the success of the Universities of the Third Age (UTA) should be emphasised. In 2010, there were 250 UTAs, with approximately 100 000 students in Poland. In Małopolska, up to the end of February 2012, there were 32 Universities of the Third Age (very active beyond the region), which was an increase in number of eight compared to 2009 (data from March's Congress of the UTA in Warsaw in 2012). The role of the UTA is significant, not only as a way of educationally motivating seniors, but also helping to prevent social exclusion. Good practice is the initiative of Nowy Sącz' UTA, which has already experienced success in the professional education of older people to train them in how to contribute to the care sector (as employees or volunteers).

**Box 7 An example of an initiative for the older citizens in Nowy Sącz city – The University of the Third Age****EDUCATION at the UNIVERSITY of the THIRD AGE – NOWY SĄCZ**

Participants of Nowy Sącz' University of the Third Age are obtaining job certificates in new professions such as medical assistants, IT technicians, beauticians, tour guides, and human resources experts.

Participants of Nowy Sącz UTA's made up half of the whole course group preparing for the medical assistant examination (as an additional education level after secondary education). The course was divided in two terms, twice per week per 4 hours. At the beginning, 42 people undertook the training; of these, 31 graduated, with participants ranging in age between 20 and 60. Besides theoretical lessons, there was much practical training. Skills could be honed in a special training/apprenticeship in a rehabilitation hospital or social welfare houses (including one for older people). As a result of this, three graduates of the UTA became volunteers in the newly opened Nowy Sącz's hospice and others could be informal caregivers for their ill, disabled family members. This is an innovative project, which enables participants of the UTA to obtain useful new skills and re-enter the labour market, all for free.

Source: information from the President of the Sądcki University of the Third Age Wiesława Borczyk and <http://www.dziennikpolski24.pl/pl/magazyny/kariera/1219196-nowe-kwalifikacje-na-emeryturze.html,0:pag:2#nav0> [August 2012]

Besides these, a significant change in attitude towards senior's education could be brought about by the EU funded project "Life-long learning", especially from the following programmes:

- *Leonardo da Vinci programme* – supports professional education for 50+ workers as well as strategic age management in the workplace.
- *Grundtvig programme* – provides funds aimed at supporting non-professional education, including training in ICT, foreign languages and learning through volunteer activities. One of the actions is targeted exclusively at those citizens aged 50+, while others reflect the priorities set by Poland to promote initiatives aimed at seniors. Unfortunately, in the last programming period, Grundtvig had to operate with as little as 4% of the total Polish life-long learning educational programme budget. In 2012, the programme was under negotiation and there was no guarantee that educational actions for older people will be able to be continued under this programme (information supplied in March 2012).

#### **Box 8 An example of an initiative for older citizens in Kraków city: The Fullness-Of-Life Academy**

This is a non-government organisation acting in support of middle-aged and elderly people, which was established in 2002 (initial actions were initiated in 1998). Primarily, they run educational activities such as computer classes for seniors, language courses, seminars, lectures and other such programmes. They obtain finance for these activities mainly through participating in grant competitions organised within EU programmes, as well as from Polish and foreign foundations, embassies and government administered funds, as well as from private donors. The Fullness-Of-Life Academy is an association that supports middle-aged and elderly people, particularly women. Their goal is to improve the quality of these peoples' lives, by creating a wide range of educational opportunities and activities to do in their free time. They put special emphasis on giving senior citizens access to modern computer technology and the achievements of contemporary science and culture. They also aim to change the negative stereotypes concerning the position and role of elderly people in society, as well as changing their own attitude towards their maturity and age. The academy strives to create a new image of a pensioner as someone who is up-to-date, independent, and willingly and actively participating in the modern world. They organise computer classes, language courses, lectures, seminars, discussion groups, club meetings, hobby groups, and whatever else might interest their members or sympathisers. In addition, the academy supports and encourages all the ideas and grass-root projects of the seniors themselves, supplying them with premises and technical aid.

Selected projects of the organisation include the following.

##### Zróbmy to Razem (*Let's Do It Together*)

The 2005 project was one of the biggest successes of the organisation. The main objective was to create and test a basic computer literacy manual for middle-aged and older people, by working together with the seniors themselves. The manual was supplemented with a set of exercises and some guidelines for the course instructors. A thousand copies of the manual were printed and provided to the people and organisations concerned. This was the first such textbook in Poland, and it still enjoys enduring popularity. It was created by and for seniors. The project was subsidised from the EU programme PHARE 2002 - "Strengthening the antidiscrimination policy".

##### WWW-GOLDEN-AGE

This was the first international project of APZ, involving: Finland, Spain, Hungary, Lithuania, the Czech Republic, and Poland (2004-2007). Its main objective was to share the experience of getting seniors acquainted with computer technology. The project included senior and instructor meetings in various countries, as well as

activities carried out via the Internet, such as chatting, keeping up e-mail correspondence, and building a webpage together. The association was the co-ordinator of the project. The project was subsidised from the EU programme Socrates-Grundtvig-2.

**Sentenced to new technologies - Active seniors in the information society** (Skazani na nowoczesne technologie - aktywni seniorzy w społeczeństwie informacyjnym)

This was an antidiscrimination project undertaken in 2007. The aim was to increase seniors' knowledge about new technologies and how to use them. This was achieved by organising courses designed to: set senior citizens up to be future computer trainers for other seniors; teach basic computer courses for older persons; and various other similar activities. A special event was organised within the project in April 2007, in order to draw people's attention to the problem of social exclusion of seniors within the information society.

Source: [www.akademiapelniazycia.pl](http://www.akademiapelniazycia.pl) [25.03.2012]

A wide variety of interesting initiatives with and for older people were undertaken in Małopolska during the last decade. Many of these were financed from the European Social Fund (including the Operational Programme of Human Capital, Fund for Civil Initiatives (FIO), and the Grundtvig Programme), but their scope was usually limited to the local level. However, regional initiatives do exist, and one such good example (Box 9) demonstrates how public institutions can support the education of senior citizens – as in the example of the activities undertaken by the Regional Public Library in Kraków. The importance of the skill ecosystem in the region should be promoted and expanded upon, especially as the population ages.

#### **Box 9 An initiative for older citizens in Kraków city**

##### **School of @ctive Senior Citizens - S@S**

**S@S** is a complex programme, carried out since 2007 by the Polish-German Society in Kraków, in partnership with the Voivodeship Public Library in Kraków, and addressed to a group of senior citizens. S@S intends to trigger the activity of middle-aged and elderly people by creating conditions that are amenable for integration and self-accomplishment, through the acquisition of new skills, development of interests, exchange of expertise and experience, and achievement of plans and ideas. Updated information is available at all times on their website (<http://www.sas.tpnk.org.pl/>), outlining details regarding projects, interesting meetings and exhibitions.

Some of their projects include:

##### **TeachNET - learning and teaching with seniors and youth**

Grundtvig Partnership Project; implementation period: 2009 – 2011

**Target group:** both senior citizens and young teachers. Seniors gain access to improved teaching methods, while teachers can use the acquired experience to become more professional.

##### **HEuRIT(AGE)**

Grundtvig Partnership Project; implementation period: 2009 – 2011

**Project objectives:** preserving individual memories, events and people's stories for posterity, as well as strengthening the European identity. Archiving for the collection of materials is based on new technologies. These activities are run in close co-operation with senior citizens.

Source: <http://www.sas.tpnk.org.pl/> [25.03.2012]

## CHAPTER 5 SOCIAL TRANSFORMATION AND INCLUSION<sup>1</sup>

The social assistance sector has grown over the past decade. From 2000-2010, the social assistance sector created 2 500 new jobs. In 2010, in Małopolska alone, social assistance institutions employed almost 11 000 employees (about 294 more than in 2009), which ranks Małopolska fourth in Poland. Social workers play a key role within the social assistance sector, with 1 640 being employed within the region in 2010 (about 134 more than in 2009), which ranks Małopolska third among the regions. In Poland generally, one social worker supports on average almost 200 people in families requiring social assistance, however, in Małopolska, this figure is only about 160 (figures for 2010). Employment in the ‘white’ sector in Małopolska was estimated to be equal to 88 494 in 2008, 90 709 in 2009 and 90 290 people in 2010, with this slight decrease explained by the overall worsening economic trend compared to previous years (*Biały i zielony sektor w woj. Małopolskim*, 2011).

The old age dependency ratio in Małopolska has increased from 16.1% in 1991 to 19.2% in 2010, and the young dependency ratio has dropped from 39.6% at the beginning of 1991, to 23% in 2010. Consequently, the increased number of older people and decreased number of younger has already seen impacts on various fields, and projections show that the process will only continue. Fewer children mean fewer schools and teachers are needed, and thus fewer jobs related to children and the young, including in the education system, are needed. However, for the increased number of older inhabitants, more jobs are needed in the health, health care and long-term care sectors (white economy). Increased numbers of dependent older people also mean more social services are needed for those who cannot receive help, support and care from their families, especially for those living alone far from available infrastructure. For older people, there is also a need to adjust public infrastructure such as transport to assist with meeting their needs and increase their mobility.

In 2010, there were 756 067 old age pensioners in Małopolska, in addition to disability pensioners and people on other social security support such as family pension benefits. There has been a decrease in the number of disability pensioners from around 326 000 in 2000, to 115 000 in 2010, however, a substantial increase in the number of old-age pensioners from 241 300 in 2001 to 423 143 in 2010 has meant there are ongoing demands on the system, although the numbers of farmer pensioners has decreased.

Over 87 500 families, and 260 000 individual members of these families (7.8% of Małopolska’s overall population), benefited from social assistance in 2010. Compared to 2000 figures, this is about 5.7% lower). Mostly, support is provided for reasons of poverty (60% of all recipients) and unemployment (40%), in addition to causes such as illness or disability, which are not considered to be a single reason for needing help. The majority of beneficiaries are families with children (46 000 in 2010) and 23% of all households that received support were pensioners’ households (both old age and disability pensioners). In

<sup>1</sup> Based on relevant chapters from the Annual Report on the Małopolska Region, 2011 (I. Banasiewicz. *About Social Assistance and About Health* - Anna Młynarczyk, Kinga Karbarz, Edyta Sokoła, Anita Woźniak, Agnieszka Markielowska, Beata Wilk-Woderska, Radosław Grochal, Aldona Kokodyńska, Monika Seweryn).

Małopolska, there are currently 394 social assistance institutions (at different levels of governance), however, since 2000, there was a significant increase, with 135 new institutions being added.

An greater number of inhabitants within the Małopolska region participated in 24-hour care, daily and advisory support via the various institutions related to the social assistance sector, between 2009-10, with an increase of approximately 44 000 additional people being supported. It is estimated that between 2000-2010, approximately 2 500 jobs were created within the region in the social assistance sector. The authorities at the gmina and powiat levels spent more than 221 million zlotys in 2010, which is an average of about 853 zloty per person receiving social assistance. An example of care services for older inhabitants is given in Box 10.

#### **Box 10 Care services for older inhabitants in the gmina of Lipinki**

In the Lipinki gmina (Gorlice powiat), a project in 2008-2010 enabled employment of caregivers for older inhabitants of this gmina. The project was financed through the special After Accession Programme in Support of Rural Areas. During the project, there were 7 caregivers employed, and these people still continue to provide those services, even though the project officially ended in 2010. The wages of formal caregivers are financed nowadays from the gmina's own funds, as there was no other option to receive funds from other sources (as indicated, there is a lack of such programmes and ways of obtaining financing). At present, 23 older people are care receivers. During the project, people received rehabilitation at home, and this support has continued due to the establishment of the Public Centre for Rehabilitation in the Lipinki gmina, which is operating through a contract with the National Health Fund. All services are free for anyone who has a special delegation from their GP or other doctor. For those who have problems with getting to the Centre, there are transport services available. At present, there is a need to introduce specialised care services for mentally ill people, and two caregivers are updating their skills in this field. The cost-benefit analysis provides evidence that such a system is effective for the gmina, as it still costs less for salaries for those staff currently employed under the programme, compared to subsidising the care receiver if they had to be in a nursing home. In addition to these financial reasons, such a system of care services is also profitable, as it has supplied work in the white sector economy for 5 people. As one care receiver states: *"I would like to live in my own flat till the end of my life, having the help and support of the formal caregiver who always understands me, smiles and ensures that I do not feel lonely and rejected"* (individual care receiver's opinion).

*Source:* information obtained from Gmina's Centre for Social Assistance (K. Ślusarz).

According to the participants of the workshop, older people are just one group of people who are at risk of social exclusion in Poland and within the region. This is not only because of the decline in their economic and material/financial situation, but also due to the revolutionary technological changes and their lack of ICT skills, which nowadays are vital in order to gain access to up-to-date information.

In discussions concerning the population ageing and the possible reasons for the low fertility rates, participants of the focus group noted that decisions to have children are often determined by economic factors such as an insecure labour market situation, family unfriendly income and tax systems, lack of adequate tax deductions, and the lack of adequate infrastructure for taking care of children.

Studies of the infrastructure of childcare facilities in Małopolska in 2010, show that an average of 90% of children aged 6 were enrolled in the preschool education system. There has also been increased participation in preschool education for children aged between 3-5 years over the last 10 last years. This is due to preschool education institutions taking advantage of EU funding that is provided to develop infrastructure for regional support for families. However, these figures vary across the region. For example, in 2010 in Kraków, 90.22% of children aged between 3 and 6 were in pre-school education institutions (such as kindergartens or preschool classes). This is due to the fact that in Kraków, as in other large regional cities, more parents are working, and if other options for childcare such as assistance from



grandparents are not available, preschool becomes the alternative solution. In comparison, for the more rural areas, including the southern part of the region in powiat Nowosądecki, it was about 52%<sup>2</sup>. This discrepancy can be explained by the fact that more women remain at home and can thus take care of their children, as well as grandparents often living together in the same house or near to their families, meaning that they can take care of their grandchildren while parents are at work if childcare is not easily and freely available. In the case of the Małopolska region, especially in rural (mountain) areas, the distance and lack of access to childcare facilities are problematic. However, the European Social Fund can be utilised to help change the situation, as demonstrated by the project outlined in Box 11.

### Box 11 Kindergarten: “Time of Children’s Dreams”

In Ochotnica Górna, two locations are financed by the European Social Fund via the IX Operational Programme of Human Capital: The development of education and competencies in regions project, which has been able to set up and provide free childcare facilities and wide-ranging educational and cultural activities for children aged from 2.5 up to 5 years old.

Source: <http://niepubliczneprzedszkole.edu.pl/ochotnica/projekt-unijny.html> (interview with Cezary Schiff).

Additionally, there are several current issues which demonstrate how overburdening and other problems affecting Polish families need to be taken into account in any discussions about the ageing population and dropping fertility rates, according to the participants of the workshops. Parents engaged in work often have little time to spend with their children, and so leave the responsibility for the children’s upbringing to the grandparents. On the other hand, there is a lack of intergenerational communication between grandparents and grandchildren, which this level of interaction could help overcome, and so promote transfer of knowledge and exchange of experiences between generations. Women in Poland are in a challenging situation - besides working, and taking care of children, they also often provide care or support for older family members such as parents. Therefore, the issue of reconciliation between work and support or care responsibilities plays an important role in deciding whether or not to have a child.

However, thanks to EU funding, there are some projects designed to assist women who are unable to find work after taking maternity leave. Engagement methods and increasing the skills of the mother are part of the support provided by these projects. An example of one such innovative project in the Małopolska region, in Kraków, which was set up by the *Stowarzyszenia Doradców Europejskich PLinEU*, was awarded first prize in a regional competition for the best project in the category of “Parent friendly jobs”, which was financed from project funds for the Operational Programme of Human Capital as part of the European Social Fund in Małopolska (Box 12).

### Box 12 Stowarzyszenie Doradców Europejskich PLinEU (The Association of European Advisors – PLinEU)

This non-government organisation, located in Kraków, aims to support women’s activities in the social, economic and public spheres, via various projects and initiatives.

One of their projects, “*Parent friendly jobs*”, is designed to support people (mainly women) who have tried to change their profession and obtain new skills in order to return to work after maternity leave. There was an innovative, individualised approach utilised, which provided an opportunity to undertake certified training as sales representatives or project managers. Parents from Małopolska who were not currently in work, or were

<sup>2</sup> More about the preschool education could be found in recent report “Upowszechnienie edukacji przedszkolnej w Małopolsce. Stan i kierunki wsparcia”, Małopolskie Studia Regionalne, Departament Polityki Regionalnej, Urząd Marszałkowski województwa małopolskiego, Małopolskie Obserwatorium Polityki Rozwoju, Kraków, 2012.

unemployed, could participate (ie. not only those who were formally registered as being unemployed). Participation in the project was free, and during training, parents were able to obtain the help of nannies for childcare, paid from the project. In total, 60 out of 91 parents were actively employed in the labour market following the end of the project (data obtained from 2011).

The project was awarded first prize in the regional contest for the best Human Capital EFS projects, and also appeared in a special publication that outlined best practice projects of the EFS. The organisation is active in other pro-family initiatives and projects, including coaching in reconciliation work and care, "Time Bank" ([www.pracujacyrodzice.pl](http://www.pracujacyrodzice.pl)), which is designed for employed parents, encouragement of workplaces that are children and family-friendly, and other such arrangements.

Source: <http://plineu.org/>

Another important issue is related to the lifestyle of current older people - according to a national representative survey on living conditions and quality of life (Diagnoza Społeczna, 2011), 27% of men and 26% of women aged 65+ in Poland spend 2 to 3 hours per day watching television. Approximately 20% of older respondents are watching television for 3 to 4 hours per day, and 25% –are watching more than 4 hours per day. Only 2% of seniors do not watch television at all. Rural-based senior citizens, as they are farmer pensioners, usually try to help with the family farming business (owned by their children) as long as possible. Seniors who live in the cities, especially in Kraków, have more opportunities to participate in social, educational and cultural activities (see Jedlińska, 2010, for more recommendations regarding options for social inclusion for older people in Małopolska).

Despite the fact that local authorities already promote and run programmes designed to encourage social interaction in the region's older population, through such activities as grant competitions for educational, integration and activation projects targeting the older population, supporting the social economy, and launching many new activities, such as the "Kraków for seniors" portal, "Senior friendly places" actions, and Universities of the Third Age, it is very important for authorities at every level to coordinate and support these activities co-operatively.

The policy conclusions from this analysis indicate that the conscious, responsible and effective creation and implementation of social policy, particularly in relation to demographic change, is primarily the responsibility of the central, regional and local authorities. Local and regional authorities should systematically address the above issues and create conditions designed to assist and support development of grassroots initiatives, targeted actions for non-government organisations, and support for innovative activities.

### Box 13 Social transformation and inclusion emerging themes

- Given the relevance of achieving a good balance between family and professional life it is worth exploring various kinds of opportunities for families.
- Projects should not only target "mothers", but both parents, as demonstrated in the "parent friendly jobs" project.
- Working women with young children and ageing parents particularly need support, as they have a double burden in terms of care for their family.
- There is an urgent need to have government solutions and company measures to support this group.
- The role of the social economy and social co-operatives in engaging socially excluded seniors should be considered in terms of implementing the changes in current regulations and requirements, which could be more effectively and widely utilised for this group.
- Older workers, particularly women, whose skills are out-of-date and are not seen as having any value for younger workers so that the intergenerational transmission of knowledge and experience seem difficult to realise.

A crucial question needs to be asked: *Is the knowledge of these women really out of touch with the market?* In the context of the Małopolska region, which has traditional businesses such as the regional food industry, co-operation with new business start-ups by young entrepreneurs, who can promote ideas, services and products outside the region with the support of their ICT skills, and older workers, who can act as suppliers, can be a very effective way of attracting markets such as tourists, from outside the region.

- It is also challenging to find a way to statistically record the actions of older people at the local and regional level in various activities which they presently undertake, such as providing care services, helping in the family business, volunteering etc.

Source: OECD Kraków Workshop Focus Group

Last, but not least, transport infrastructure (including transport options for seniors) in Małopolska was analysed in a strategic document about the silver economy in Małopolska (*Wyzwania Małopolski w kontekście starzenia się społeczeństwa*, 2010). Although transport generally in Poland is not well developed, the situation in Małopolska is somewhat better than the average. For example, in 2009, there were 7.3 train tracks in Małopolska per 100 km<sup>2</sup> in 2009, while in Poland the figure was 6.4, although in the Silesia region it was 17.4. There were less cars per 1 000 inhabitants in Małopolska in 2009 compared to Poland- 418 versus 432 (OECD database, 2012). However, only 46.5% of national roads in the Małopolska region are evaluated as being in good condition.

Because many senior citizens in Małopolska, as for most of Poland, do not have cars, some areas provide support and concessions. For example, the city of Kraków, offers free public transport for seniors aged 70+, and also a special discount card for families of 4 people or more. In Małopolska in 2010, 61.6% of total households had a car, and only 63.6% of households had a computer with Internet access (*Budżety gospodarstw domowych w Małopolsce*, 2011), which was yet a marked increase from 2005, when only about 27.5% of households had a computer with access to the Internet (*Regional Strategy of Małopolska, 2013-2020*). In “Challenges of the Małopolska region” (2010, p. 35), analysis of transport facilities concludes that: *“The development strategy for Małopolska has to be adjusted to the needs of the elderly and using this adjustment as an element for the development advantage of the voivodeship requires high-level and special preference for investing in elderly-friendly public space and an adjusted public and regional transport”*.

## CHAPTER 6 GREEN REGIONAL/INDUSTRIAL ATTRACTIVENESS<sup>1</sup>

The region is very diversified when one considers geographical location differences, and green and tourism attractiveness. Kraków city is well known and recognised as an historical, cultural and academic centre, which attracts visitors not only from Poland, but also international tourists.

In Małopolska, there are 5 national parks (Babiogórski, Gorczański, Ojcowski, Pieniński and Tatrański), 84 nature reserves and 11 natural landscape parks. Małopolska is the most visited region in Poland, as it offers unique opportunities for various tourism and sports activities, including active holidays such as: skiing, rock climbing, water sports at three lakes (Jezioro Rożnowskie, Czchowskie, Czorszyńskie) and more general options of horse riding, tennis and golf clubs, swimming pools and thermal pools, canoeing/rafting, and diving. The important recreational and tourism areas in addition to Kraków are: Zakopane, Krynica Górská, Szczawnica, Zawoja, and Gorlice.

The western part of the region is traditionally related to the industrial sector, which was supported by better technical infrastructure than other parts of the region, including better roads and the A-4 highway, which provides easy and quick access to Upper and Lower Silesia. As the more industrialised part of the region, it is seriously affected by environmental degradation, and in the Oświęcim powiat, the highest readings of gaseous pollutants and greenhouse gas emissions in the region are observed (refer to reports of the Marshall's Office for more detail on this topic).

The northern part of the region, with its relatively good natural conditions for agriculture, and one of the best quality soils in the region, combined with low development of other sectors of the economy, is traditionally the agricultural region. The agricultural sector is better developed here than in other parts of the region, but at the same time, it is relatively speaking the weakest part of the region, with a low rate of economic development and the highest share of farming-based incomes.

The southern part of the Małopolska region is very rich in natural and tourism resources which, due to its geographical layout of hills and mountains, and lower quality of soil, is not favourable for agricultural or industrial development. Instead, this part of the region is characterised by its high level of attractiveness for tourists, which in turn is supported by relatively better developed infrastructure aimed at tourism, including spas and health/rehabilitation centres.

The south-eastern part of the region is dominated by agricultural poviats, including mountain agriculture and horticulture. Gorlicki and Limanowski poviats are dominated by horticulture, based on family farms/households. Typically for Małopolska in general, many farms are small in size. Nowy Sącz, which is located in this part of the region, is also an important academic centre. In this area, industry and services have also been developed within the framework of a special economic zone.

<sup>1</sup> Authors for the environment issues in the Małopolska Region Annual Report 2011 were: Magdalena Burek, Monika Budzińska, Elżbieta Łojan-Tomal, Piotr Łyczko, Marcin Woźniak, Edyta Gach; with energy information supplied by Wiesław Fela. This information was used in preparing this part of this working report.

The eastern part of the Małopolska region is dominated by Tarnów, and focused around agricultural areas. Tarnów is mostly a developing service sector, with entrepreneurship activities and, in addition to being an academic centre, is also the centre for development of new technologies. However, environmental degradation is still an issue, due to the fact that azote (nitrogen) production, which is the highest polluting industrial sector in the entire region, is located in Tarnów.

Statistics outlined below demonstrate the health implications resulting from this pollution, which is of concern to the local society. Attention must therefore be paid to promoting cleaner industries, in order to provide a healthier environment. Additionally, the area's natural attractiveness provides further opportunities for economic growth in tourism, with the agricultural areas potentially providing opportunities for the area to be more ecologically focused in its economic outlook.

In terms of the development of the ecological sector, Małopolska leads the way compared to other regions. In 2003, there were only 407 ecological<sup>2</sup> households, while in 2008, there were 2 100 registered (data sourced from the Marshall's Office). Małopolska demonstrates the potential to further develop its ecological economy through high quality food production, not only because of the natural and environmental conditions present, but because of the region's agricultural tradition (including small households) and socio-cultural values.

In contrast to this, pollutants are a serious problem for the health status in the region, which could have a higher risk of developing respiratory and cardiovascular diseases. Detailed analysis in 2010 of industrial air pollution in Małopolska registered a total air pollution level of 140 800 tonnes (t)<sup>3</sup> (Małopolska, 2011), which was a decrease of 6.5% from 2009. The structures of the emissions in 2010 were dominated by methane (42%), sulphur dioxide (21%), carbon monoxide (16%), and nitrous oxide (15%). Most industrial pollution in 2010 came from the district of Oświęcim (42%) and the City of Kraków (25%), followed by the City of Tarnów (9%), the Chrzanów district (9%) and the district of Kraków (6%). The emission of pollutants was associated primarily with industrial activities. In 2010, industries in the Małopolska region issued 10.8 million t of carbon dioxide, 58 400 t of methane, 1 400 t of nitrous oxide and 1000 t of sulphur hexafluoride.

Most greenhouse gas emissions in 2010 were issued in the City of Kraków (35%) and the powiat of Chrzanów (18%), powiat of Oświęcim (16%), the city of Tarnów (13%) and the powiat of Kraków (11%). Industrial plants emitted the largest amount of greenhouse gases and included, the power station companies such as Elektrociepłownia Kraków S.A., and the metallurgical mill (ArcelorMittal Poland S.A. - Kraków branch).

According to the assessment of air quality in Małopolska for the year 2010, made by the Małopolska Voivodship Inspector for Environmental Protection, the limit values for PM10 (particulate matter 10 micrometres or less in diameter) and PM2.5 (particulate matter 2.5 micrometres or less in diameter – generally described as fine particles) dust and the target values of benzo (a) pyrene occurred in all zones in the Małopolska region. Moreover, in Kraków, the annual average limit values for nitrogen dioxide have been exceeded.

In 2010, the highest annual average concentrations of suspended particulate matter PM10 were measured at monitoring stations at Krasinski in the city centre of Kraków (at a communication station): 79 mg/m<sup>3</sup> (compared to 78 mg/m<sup>3</sup> in 2009) and in Proszowice (at an urban background station): 69 mg/m<sup>3</sup> (as opposed to 60 mg/m<sup>3</sup> in 2009). In Kraków, at Krasinski the daily average allowable PM10 levels were exceeded during 223 days within the year (up from 221 days in 2009), while in Proszowice, it was

<sup>2</sup> E.g. an agricultural household utilising organic farming production methods.

<sup>3</sup> 1 tonne (t) = 1 000 kilograms (kg)

exceeded during 179 days of the year (146 days in 2009). In 2010, there were 113 breaches of emergency levels of PM10 (200 mg/m<sup>3</sup>), mostly in Kraków; in Avenue Krasinski (14), in Bochnia (12) and in Proszowice (12).

The management of municipal waste in the Małopolska region is by depositing it in landfills. According to the Central Statistical Office, in 2010, 91.6% of mixed municipal waste was disposed of in landfills, 4.9% was segregated from mixed waste, and biological transformation processes accounted for only 3.5% of the waste. In the area of Małopolska, there are 28 legal landfills for non-hazardous and inert materials, in which municipal waste is deposited (as at 31 December 2010). Two of these do not comply with current legislation in the field of technical equipment.

In 2010, in the Małopolska Region, approximately 766 400 tonnes of waste was collected (according to Statistical Office in Kraków), including 414 300 tonnes from households. Selectively collected waste constitutes 12% of the overall weight of waste collected and amounts to 88 700 tonnes. The overall weight of the collected mixed municipal waste originated from:

- Trade, small businesses and institutions – 237 300 t
- Municipal services – 26 100 t
- Households total – 414 300 t.

In Małopolska in 2009, electricity consumption slightly increased in households, by 0.15% compared to 2008, however, households in urban areas decreased by 0.67%, while in rural areas electricity consumption increased by 1.15%. From 2006-2009 there was an overall increase in electricity consumption of 5.3%; cities increased by 2.3% and rural areas increased by 9.0%. The highest electricity consumption per capita in 2009 was recorded in the poviats of Tatry, Kraków, Wieliczka and Proszowice.

The development of the sewerage system in Małopolska was not as rapid as the development of water supply. It was not until 2005-2010, that the growth in the sewerage system was greater than the growth in the water supply network. According to the Statistical Office of Kraków, in 2010 in Małopolska, 521 kilometres (km) of sewerage network were built (the length of the sewerage system was 10 008 km), while in 2009 this increased to 790 km. In Małopolska, there are still disparities between the length of the sewerage system in the urban and rural areas, although this situation is improving. In 2005, rural sewage accounted for 51.9% of the total length of sewerage network while in 2010 the sewage system in the country already accounted for 57.6% of the total length of sewerage network in the region. The number of municipal sewage treatment plants in the Małopolska province is 234, including: mechanical (1), biological (177) and those with increased biogene removal (56). Construction, expansion and modernisation of sewage treatment plants and the construction and modernisation of collective sewerage systems in the gminas are carried out under the National Programme of Municipal Wastewater Treatment (KPOŚK). This programme provides the infrastructure facilities for urban sanitation through to the end of 2015.

Recent studies concerning the possibility of developing a green economy in the Małopolska region are limited. In 2008, there were 51 729 persons employed in the green economy, by 2010 this figure had decreased to approximately 49 038, mostly due to the worsening economic situation, which affected employment in this sector. According to the authors of the study (Biały i zielony sektor, 2012), this sector in Małopolska will not be in a position to sustain more jobs in the near future as it is very sensitive to the changing economic situation. The authors of the study recommend that there should be *more investments in modernisation and introduction of more innovative technological solutions in this sector.*

## CHAPTER 7 REGIONAL/LOCAL INITIATIVES AND POLICY ISSUES

This chapter discusses examples of local initiatives related to the demographic change in the region (examples include the city of Kraków, and the Nowa Huta district, which is experiencing population ageing) and the results of a small scale policy survey among local stakeholders.

### 7.1 Examples of local initiatives

One of the first examples of a social policy programme regarding older people in Małopolska was a special programme called '*Regional Programme of Social Policy and Social Assistance against Ageing for 2003–2005*' (which was then extended until 2007). The programme aimed to help older people to: solve their everyday problems (eg. organising care in their place of living); improve seniors' quality of life (by access to different types of assistance, and activities and promotion of 'good ageing'); and reduce the threat of social exclusion. The issues of seniors and families have for long been present in the strategic documents of the Małopolska region (eg. in the *Development Strategy of the Małopolska Region for 2007–2013*<sup>1</sup>).

At present, the issue of ageing is addressed by the *Development Strategy of the Małopolska Region for 2011–2020* (the strategy). The strategy is the most important document referenced by the region's government, determining the areas, goals and directions of intervention for developmental policy at the regional level. The Development Strategy of the Małopolska Region for 2011–2020 is the result of over two years of work. The current strategy is composed of seven thematic areas, and one of these includes the demographic issues under the area of *environmental, health and social safety*. In this area, there are numerous themes, but of particular interest to this report is sub-action 6.3: *Improving social safety by integrating social policy*, in which the aim is to prevent and eliminate social, cultural and economic exclusion, especially among vulnerable groups, including the elderly, and disabled people. One of the activities planned within this action is implementation of the regional strategy of action in the context of the ageing society. According to the planned strategy, it will be necessary not only to adjust the labour market, but also to build up new specialist services targeted at seniors. This process is important not only for social integration and improvement of quality of life, but also for economic growth, including the concept of the silver economy.

As the new Development Strategy of the Małopolska Region addresses the ageing issue, another specific strategic document entitled *Challenges of Małopolska* in the context of an ageing population (*Wyzwania*, 2010<sup>2</sup>) was developed. The key recommendations of this document are:

- The need to incorporate the silver economy model into strategic documents at all government levels.
- Introducing a long-term health promotion programme for healthy ageing.

<sup>1</sup> See strategic document publications on demographic changes in Małopolska and in Poland, Perek-Białas, 2009

<sup>2</sup> Prepared under the supervision of Prof. dr hab. Stanisława Golinowska.

- Improving and adjusting transportation to meet the needs of senior citizens.
- Educating physicians to specialise in geriatrics and extending the university curriculum in geriatrics in all medical majors, and training general physicians in the area of medical consultation for the elderly.
- Finding solutions aimed at supporting care at home with non-permanent caretakers and nursing help.
- Development of small local social care centres, including day-care centres.

Regional interest in demographic change can be found in Małopolska in various regional documents and initiatives, such as the project PEOPLE “Innovation for social changes”<sup>3</sup>, “ADAPT2DC”<sup>4</sup>, and in the criteria set for projects in the regional parts of the Operational Programme of Human Capital of the European Social Fund. For example, the Silver Academy was a project implemented as a part of the PEOPLE mini-programme (INTERREG 4C), which included entrepreneurship training workshops for senior citizens. The aim of the Silver Academy was to support the development of the local SME sector by: providing a realistic enterprise alternative for the over 50s; developing new business models suitable to this sector; harnessing the direct experiences of local businesses; addressing over 50s’ unemployment; and developing new levels of engagement between Universities and business networks for the benefit of the over 50s. Another project aimed at supporting the participation of older people in European projects is the Sensitive Client “Participant” of Human Capital Projects<sup>5</sup>. Other regional institutions such as the Regional Labour Office and the Regional Centre for Social Policy, as well as local institutions at the poviats and gmina levels, are focused on implementing initiatives and projects designed to prepare for the demographic changes that are occurring. In the case of the recent project, “ADAPT2DC”, the main goal is to develop innovative solutions to adapt public infrastructure and services to demographic changes in the Central European regions, as well as developing more concrete strategic plans and providing direction for actions at the region and local level.

According to the participants of the workshop that discussed sustainable local development models: the urban form and social and financial implications of an elderly society means that strategic documents, especially regional ones, are important for the local level, as they provide a direction for changes and possible actions, namely, how to use public funds, and also indicate priority to local management.

#### Box 14 Regional and local policy emerging themes

- Planning with future demographic transition in mind, therefore, is important to ensure maximisation of benefits in the long-run.
- Integrated policy impact assessment tools, such as those utilised by the European Commission (called “Impact Assessments”), may be referenced by policy makers when identifying different choices and trade-offs (e.g., expenditure on youth vs. elderly).
- Also important in decision making processes are consultation across different policy fields (i.e., horizontal co-operation among different departments) and stakeholder engagement.

Source: OECD Kraków Workshop Focus Group

The Regional Centre of Social Policy has initiatives which aim to engage seniors, including VI Małopolska’s Competition – Outside the Stereotype – Senior of the Year 2012; the elderly friendly places in Małopolska in which many places and institutions receive the title and can promote their activity with

<sup>3</sup> [www.peopleproject.eu](http://www.peopleproject.eu) [25.04.2012]

<sup>4</sup> <http://europasrodkowa.gov.pl/projekty/konkurencyjnosc/item/209-adapt2dc> [25.04.2012]

<sup>5</sup> <http://www.fundusze.malopolska.pl/pokl/Strony/default.aspx> [25.04.2012]



this statement - this idea is based on similar actions called ‘children/family friendly places’. Recently, there have been additional promotional programmes to promote ‘active old age’ and ‘solidarity between generations’ and a guide was published outlining means of helping and supporting old people in Małopolska (for seniors, their families, caregivers and staff working with seniors). From 2012, the Regional Centre of Social Policy has been managing the project “The Helpful Hand”, financed via the Polish-Swiss Co-operation Programme, which supports social assistance houses/institutions in the region in innovative developments, and needed local community infrastructure, in order to increase the quality of their services.<sup>6</sup>

There are examples of initiatives which have already dealt with demographic changes in Małopolska, for example, the *Seniors’ Centre for Culture and Recreation*. Originally, the building housed a canteen for pupils from nearby schools. At present, as the age structure of the district changed dramatically, the institution is servicing seniors and co-operates with other social assistance houses in Kraków. The Centre offers a wide range of various activities for seniors, which helps to integrate them within society and prevent them from social exclusion and loneliness. Besides rehabilitation services and receiving meals, educational and cultural activities are also frequently organised (Box 15).

**Box 15 The Seniors’ Centre for Culture and Recreation in the Nowa Huta district of Kraków city**

**Home for Social Assistance in Kraków city (MDDPS)  
The Seniors’ Centre for Culture and Recreation (Nowa Huta)**

In 2006 the Seniors’ Centre for Culture and Recreation was established. The centre currently caters for approximately 130 people over 60+ every day, who come to participate in various activities such as: rehabilitation; artistic activities such as music, art, handicrafts and singing; Nordic Walking exercises; participation in events like “We love Kraków” and concerts; recreational trips of one or more days; organising exhibitions of participants’ art work and other such undertakings.

In the Centre’s building meals are also prepared for inhabitants of other social assistance houses in Kraków. It is important to note that a full day’s meals are able to be provided, including breakfast, lunch and dinner. This exemplifies how infrastructure can be adapted to meet the new challenges of the ageing population, as it was previously used as a canteen for nearby school children. In this way, the various needs (basic as well as rehabilitation, recreational and cultural of numbers of older inhabitants of Nowa Huta can be satisfied.

The Centre, and the overall Municipality of the City Centre, are collaborating with various universities: Jagiellonian University; the Pedagogical University; Kraków’s University of A. F. Modrzewski, which educates both students and social workers. There is also a collaboration with Małopolska’s Wyższa Szkoła Zawodowa (a higher vocational school) and with the University “Ignatianum”, and the Post-secondary School of Social Workers. There is additionally collaboration between the nearby voluntary labour corps and pupils from the vocational school, who are engaged in teaching seniors to use the computer and Internet through ICT courses (education ecosystem example).

*Source: The branch of the Municipal/City’s Daily Nursing House – oś. Szkolne 20, Kraków. Contact person: Antoni Wiatr - Director MDDPS w Krakowie and Katarzyna Mimiec – Chair of the Centrum Kultury i Rekreacji Seniorów.*

The *Seniors’ Centre for Culture and Recreation* is a particularly interesting example from a sustainable development perspective, because existing buildings have been able to be utilised by retrofitting rather than demolishing and rebuilding. This means that it combines: 1) vocational/training opportunities for the younger generation (vocational schools were located in the same compound); 2) retrofitting existing facilities (buildings that were initially intended for serving meals to children have been

<sup>6</sup> <http://www.sppw.rops.krakow.pl/> [3.01.2013]

renovated for use by seniors); and 3) providing different services to ensure social inclusion and active ageing. However, some more specific emerging themes from the study visit include:

- There is a need for analysis of quantifiable costs in order to compare retrofitting versus rebuilding of such buildings if similar buildings are planned to be used in this way,
- Assessing the potential for replicating similar types of initiatives in Kraków or Małopolska (not only based on the existing social assistance structure, but also open to everyone). This analysis of available existing infrastructure needs to be undertaken not only at the regional level, but also at the poviát and gmina levels.
- Gaining support via joint initiatives and projects with other actors, for example, the way the Centre links in with nearby vocational schools and universities. These partners could provide support via teaching courses or other activities such as rehabilitation services, on the basis of formal and paid training or apprenticeships.
- Finding ways of sharing or reducing some of the costs associated with running the Centre - this is an area in which vocational/training opportunities may play a role in the future.

Another example of an institution which supports older, disengaged citizens is the *Social Integration Club* (KIS), which is located in Nowa Huta. This is a relatively new institution, supporting inactive, unemployed and or/socially excluded people from the city of Kraków. This organisation is not designed to support only older people, but many of them are aged 50+. Various forms of assistance, advice and support are available, including job search assistance for positions suitable to their age, health status and other abilities. There are also opportunities to learn new skills (e.g. ICT skills via computer courses), and to obtain new qualifications, which can open up opportunities within areas like the care sector, or craft sector, in woodworking and ironwork (Box 16).

#### **Box 16 Some key facts about the Social Integration Club in Nowa Huta, Kraków**

The Social Integration Club has been operating since 2005, and provides individual and group support, and arranges social employment. The workshops at this Club are for longer-term unemployed participants. Usually, these people have additional personal problems, such as poverty, chemical addictions, homeless, disabled, suffering from a chronic disease, the victim of home violence, or have adaptation problems after departing from a penitentiary.

Admission to the Social Integration Club follows diagnosis of a particular problem being experienced by the beneficiary. After recognition of this problem, a contract is signed, which includes objectives, a schedule of actions, and expected outcomes. The workshops last at least 6 months, of 16 to 28 hours per month. Work with a participant starts with improving and developing their so-called 'soft' abilities (communications, responsibility, work time co-ordination, and hygiene diligence). Only after advantageous effects are recorded in their soft abilities can a beneficiary update, raise or obtain vocational skills and qualifications. During training in these vocational skills, a person has the option to work in socially useful jobs, and if a participant undertakes this well, they are then in a position to obtain a job.

The Social Integration Club (KIS) co-operates with 40 labour market entities, which are eager to employ participants that have been trained by KIS. In 2010, KIS provided support to 632 persons, of which 40% were aged 50+. There are various activities organised for participants, including: self-help groups; support and education groups; group meetings; individual participants' meetings; work in socially useful jobs and in public works. In addition, in 2010, 131 programme graduates gained jobs in the open labour market.

Attendance at the Social Integration Club is voluntary. The only condition is that they need to undertake and to realise a social contract. Workrooms available to the participants include: craft workshops; a computer training room; and individual and group meeting rooms. All facilities are furnished with essentials tools and other aids necessary to work with participants. KIS occupies two premises in the district of Kraków-Nowa Huta and

employs 20 workers. Since its inception, 820 citizens of Kraków have gained and maintained jobs thanks to the Social Integration Club (and in 2011 alone, 111 people obtained work following the training they received at KIS).

Evaluation of KIS by one participant:

*When I was 59, after 35 years of working, I became unemployed. I felt like I had been put in the corner. Not needed. Employers did not hide their surprise that at my age I was looking for a job. So the stress, depression and being more closed-in kept increasing. Thanks to the social workers, I started to participate in the KIS's activities. Today, I am 63 years old and I am doing social utility works in the KIS workshop. I and my work are both needed. I am learning new things, which I have never done before, and I have met a lot of people. My age and my health are not a problem for anyone. It is important that this social utility work I am doing I can continue to do until I retire. When I finished the training courses here, I dreamed of working in an institution where I would still continue to be needed.*

Source: information obtained from KIS, oś. Słoneczne 15, Kraków.

The *Social Integration Club* is a good example of the importance of ensuring training opportunities exist for unemployed or inactive older workers. While employment opportunities gained as a result of the training undertaken at KIS was important, a number of beneficiaries also mentioned that their sense of fulfilment, and connection with society that were gained through participation in KIS activities were equally important. Thanks to the various activities of KIS, there is a potential for the knowledge exchange amongst participants also, including inter-generational exchange.

There is therefore a need to take into account not only quantifiable indicators of such initiatives as training people, but also to include in the evaluation of such activities, the non-quantifiable aspects and how they relate to other types of benefits and costs like emotional well-being, which in its turn may help to reduce other costs, such as medical costs. Additionally, the younger generations may be able to benefit from the knowledge and experience of more senior people, which may lead to positive changes in some of the perceptions concerning the older population.

## 7.2 Small- scale policy survey

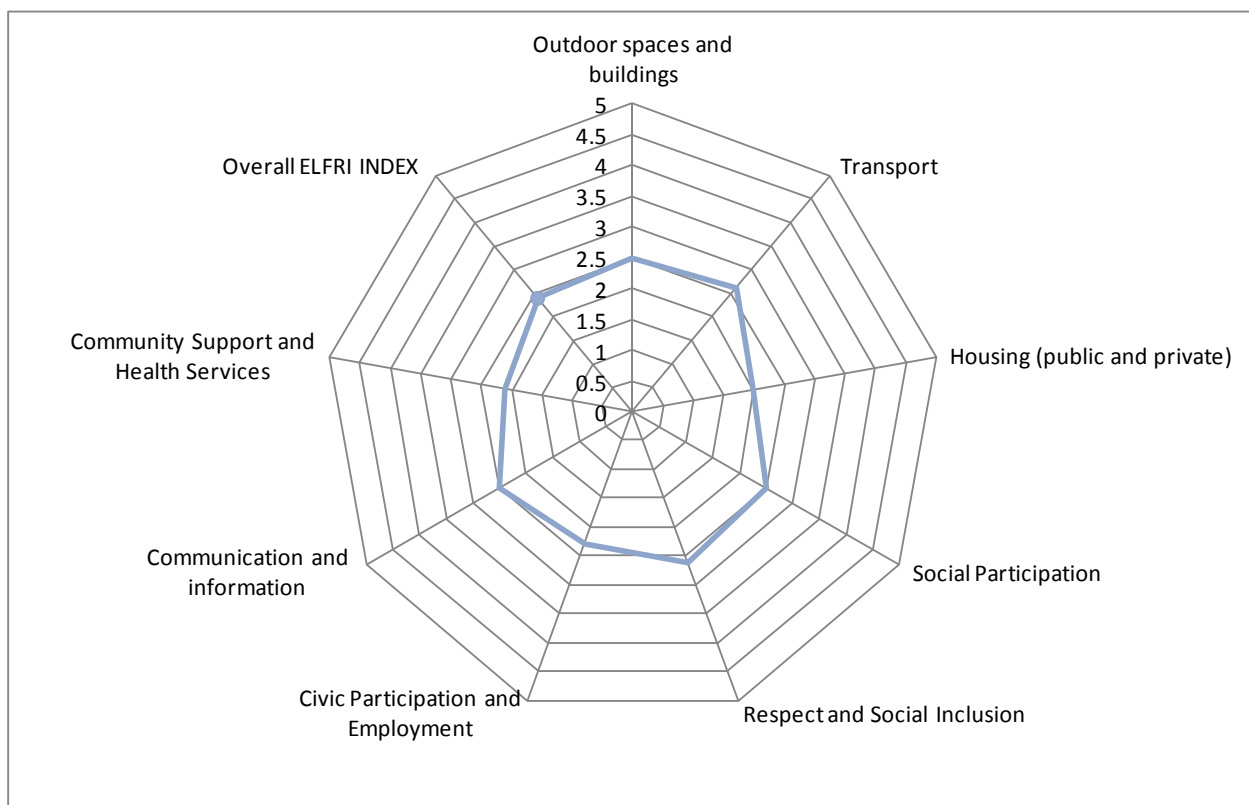
The World Health Organisation's definition of an age-friendly city advises that it encourages: "... active ageing by optimising opportunities for health, participation and security in order to enhance quality of life as people age" (2007, p.1). This means that "...in an age-friendly city, policies, services, settings and structures support and enable people to age actively by: recognising the wide range of capacities and resources among older people; anticipating and responding flexibly to ageing-related needs and preferences; respecting their decisions and lifestyle choices; protecting those who are most vulnerable; and promoting their inclusion in and contribution to all areas of community life" (p.5)<sup>7</sup>. Selected actors<sup>8</sup> from the Małopolska region were asked to evaluate the region within eight key areas identified by the World Health Organisation (2007) as demonstrating a city's age-friendliness via an OECD index, called the Elderly Friendly Places to Live Index (ELFRI).

Analysis and interpretation of the results are outlined below, which provide an indication of how age-friendly a place to live Małopolska is considered by a group of stakeholders (in total, 32 questionnaires were distributed among various stakeholders). The overall ELFRI index for the Małopolska region is 2.4 out of 5 (where 1 is poor and 5 is excellent); which is just below the average for a region being classified as an elderly friendly place to live. More specifically, the ELFRI topic index can be broken down as

<sup>7</sup> World Health Organisation (2007), *Global Age-friendly Cities: A Guide*, World Health Organisation, Geneva.

<sup>8</sup> The participants of the workshops in Wawel Castle, 26 March 2012.

follows: outdoor spaces and buildings - 2.5; transport - 2.6; housing - 2.0; social participation - 2.5; respect and social inclusion - 2.6; civic participation and employment 2.3; communication and information 2.5; and community support and health services - 2.1. –Overall, the Malopolska region as classified by the index is not considered an elderly friendly place to live. To see the averages for each area please refer to Figure 15, noting the rating of 1 indicates ‘poor’ and 5 ‘excellent’.



**Figure 15 Average ranking for Malopolska as an elderly friendly place to live**

Source: based on evaluations by workshops' participants

The results of this index indicate that, according to the respondents, who were mostly decision makers, and stakeholders in the region, there is plenty of room for improvement in Malopolska, especially in the areas of: housing; civic participation and employment; communication and information; and community support and health services. Unfortunately, there is no area in Malopolska which warranted a ranking of ‘excellent’ according to the survey participants. There are some studies which try to measure the quality of life in Polish cities, and within these studies, Kraków is located just above the average threshold, mostly due to the fact that while it is highly valued in terms of being a cultural and educational city, in evaluation of the environment, pollution and security, the city receives lower rankings than other regions.<sup>9</sup>

The results should also signal to policy makers the strategic areas requiring focus, which are particularly *housing, and community support and health services*. Although these are not areas that can be easily or quickly improved, they definitely require strategic policy focus. Other areas requiring more resources include civil participation and employment, and communication and information. These should

<sup>9</sup> <http://www.pwc.pl/pl/wielkie-miasta-polski/o-badaniu-i-wstep.jhtml> [27.12.2012]

be much easier to improve from ‘poor’ to ‘average’ within a relatively short period of time (up to 5 years), *through focused programmes and initiatives*.

In addition to evaluating how Małopolska is perceived in terms of the Elderly Friendly Places to Live Index, the key actors were asked to evaluate if Małopolska is a friendly workplace for older workers, through the Older Workers Friendly Places to Work (OLWOF) Index. The method of obtaining the information to calculate the index was the same as for the ELFRI index. The OLWOF index used categories from the American Association for Retired Persons (AARP<sup>10</sup>), which is a non-profit organisation that uses these categories to determine rewards for their ‘Best Employers for Workers over 50’ competition. Within this approach, the information related to older workers that is examined includes:

- Recruitment actions and practices
- Work and culture opportunities
- Training and skills development opportunities
- Company health and benefits provisions (titled ‘Firm health and benefits’ in Figure 16).

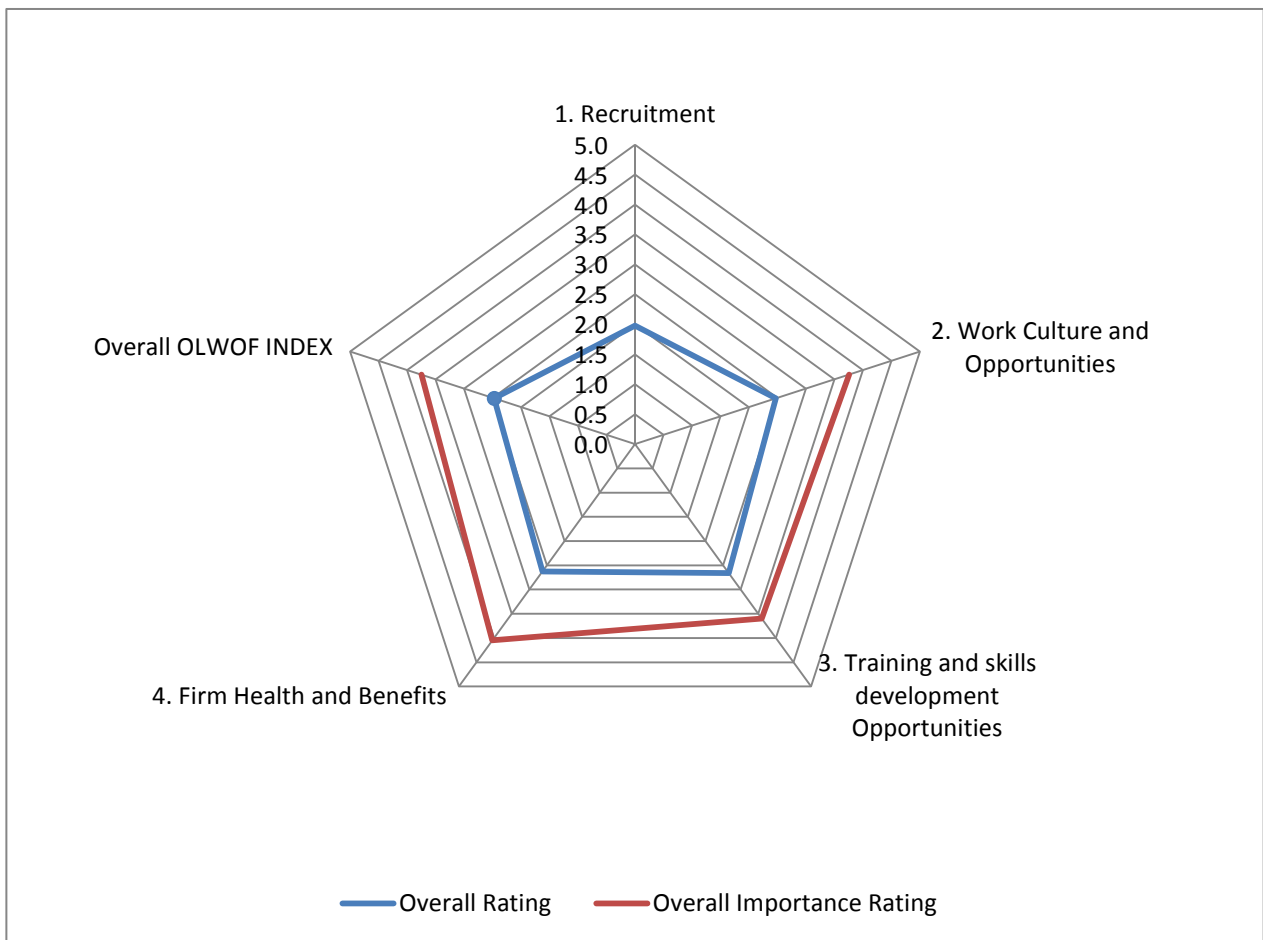
The overall OLWOF index out of 5 (where 1 is poor and 5 is excellent) for the Małopolskie region is 2.5, which places the region just below the average in the Older Workers Friendly Places to Work index. More specifically, the results of the OLWOF index by topic is as follows: recruitment - 2.0; work culture and opportunities - 2.5; training and skills development - 2.7; Company health and benefits provisions - 2.6.

It is evident that recruitment was given the lowest rank, and while training and skills development was somewhat higher, it was still not considered as being near to excellent, indicating that these areas are where *interventions and actions are needed*. The poor evaluation results for training and skills development for older workers are reflections of the discussions on this topic within the actual workshops.

The overall importance of the OLWOF indicators for the Małopolska region was rated 3.8, which places above average importance on the issue for the region. More specifically, the importance of OLWOF topics were ranked as follows: work culture and opportunities - 3.8; training and skills development - 3.6; company health and benefits provisions - 4.1. The difference between the overall rating and the importance rating reflects a policy gap between the reality of the situation and what should occur. Although the importance ranking is not overly high, it still indicates the significance of achieving older workers friendly places to work.

Figure 16 demonstrates the results and comparisons between the actual evaluation of the indicators and the perceived importance of three of these areas to create workplaces that are supportive and friendly towards older workers.

<sup>10</sup> AARP (American Association for Retired Persons) - <http://www.aarp.org/>



**Figure 16 Current evaluation vs importance of the OLWOF topics in Malopolska**  
*Source: based on evaluations by workshops' participants.*

## CHAPTER 8 KEY CONCLUSIONS AND RECOMMENDATIONS FOR MAŁOPOLSKA

This section provides a summary, key conclusions and recommendations based on analyses concerning local demographic changes and challenges facing the Małopolska region both at present and into the future, taking into account various indicators, results of study visits and workshops (Annex 2), surveys and studies of various papers and documents about the region.

Based on analysis of indicators and trends over time, the *key findings* are:

- Population ageing is the key demographic challenge for the region and if fertility rates remain low and outward migration increases, in the long term, the population size will decrease.
- Employment rates for people living in Małopolska are not as high as they were prior to Poland entering the EU.
- There are limited age management programmes.
- Education and training possibilities exist in the region, but there are no comprehensive strategic plans or actions designed to make the most of the existing opportunities in the region.
- Health and social services are not yet accessible to all citizens from the various parts of the region<sup>1</sup>.
- Geographical location and the green attractiveness of region are important assets; EU funds are used extensively and there are many examples of effective fund use related to the subject of the study.
- Regional documents, preparation and willingness of the authorities to act are already oriented towards demographic changes and their consequences.

When looking at the actual demographics, it should be emphasised that Małopolska is still in a favourable situation. While most Polish regions will face demographic decline by 2030, Małopolska is one of only four regions where the population will increase between 2008 and 2030. The overall population size of Poland is predicted to decrease by 3.4%, however, in Małopolska, the population will grow by 2.2%. Małopolska consists of 22 counties, with different populations and demographic changes. A decrease in population has been observed in the north-western part of the region, and the percentage share of senior citizens is highest in its northern part (Miechowski powiat). The intra-regional differentiations cannot be ignored, and *not only the regional, but also the powiat and gmina (county and municipality) levels are of importance.*

Firstly, regional decision makers need to be made aware of demographic changes so they can address the need for adjustments or changes to various policy areas in order to be able to meet the demographic challenges taking place in the region. It is worth remembering that, for many years, numerous relevant papers have been developed in the region (e.g. a report about Małopolska, covering similar issues as this paper, is published every year). In line with the concept of this report, such publications present

<sup>1</sup> This conclusion is based on analysis of a representative survey for Małopolska from 2007 (see Perek-Białas, 2007), where significant changes in access to various services (including health and social services) within the region were found. The worst situation was found in the poviats of Tarnowski, Dąbrowski and Brzeski,

various aspects and areas of the region, which outline the changes that are occurring, and indicate the direction for proposed actions. This knowledge is then translated into programmes, initiatives and campaigns, which already distinguish Małopolska from other regions, although so far Małopolska has not experienced the same level of demographic issues as other regions. Examples of such publications include the “Challenges for Małopolska in the Context of Demographic Changes”, which is a strategic document that has already been mentioned in this paper that includes numerous practical recommendations, as well as the “Małopolska Strategy for the Period 2013-2020”, which includes a strategy for development of the silver economy.

Secondly, apart from geographic and natural attractions, this region also holds capital in the form of human resources. The uniqueness of Kraków City itself, which is the historical and cultural centre of the region, and the presence of academic centres in the region, demonstrate why the local dimension is so important, not only from the perspective of Kraków, but also of the various municipalities (185 municipalities, including 3 cities). *Numerous disparities and the need for different recommendations, which may not be universal in nature, become apparent.*

This disparity can begin to be dealt with on the basis that Małopolska is a region that has already prepared documents containing such recommendations, which indicate different options for delivery of demographic change based policy and strategic approaches for different areas. However, if the overall region is to achieve success despite the existing demographic trends, other issues that were emphasised in the course of the workshop meetings should also be taken into account in addition to the issue of population ageing. As was noted, *the links with family policy, the labour market and the possibilities of creating new jobs in new sectors of economy* are needed. It is important that the two aspects of fertility and ageing are not separated, but rather are considered in a holistic manner. The issue of ageing should not be perceived as a problem, but rather as both a challenge and an opportunity in the longer term. It is in this way that population ageing should be discussed and presented by all people, not only by policy makers.

The issue of family policy is undoubtedly important and constitutes a significant element by which to ensure that in Małopolska, a region wherein traditions and family values continue to be important, its residents will be able to feel confident that should they have children, they will be able to count on institutions that can support them with the reconciliation of work and care requirements. *This requires that the best and the most appropriate and available solutions to facilitate childcare arrangements and work needs should be identified.* There are some municipalities within Małopolska where parents do not have to pay for nurseries and/or kindergartens, or where they receive significant discounts. This is in comparison to areas such as Kraków, where it is very difficult to enrol a child younger than three years in a nursery, and also, in some parts of the city, into kindergarten. The question of whether or not people actively desire and want to live in Małopolska, to have families, raise children, and find work that will satisfy them, is of key importance to the strength and growth of the area. If the reply is positive, then they will want to be active, and to lead healthy lifestyles supported by a healthy and safe environment, which will be translated into a high quality of life and satisfaction.

There is also a need to support seniors who remain in the labour market as well as those who are outside of this market. The definition of a senior worker may be left open, as within the next few years this will undergo dynamic changes. However, assuming that the definition will cover people aged 55+ at the regional level (and likely an even wider range at the county or gmina level), there is a lack of an adequate and updated *system of information/statistical data that would enable identification and diagnosis of current needs and opportunities in the field of activity of this group*, which is a disadvantage. Support for the ongoing development of senior citizens after they end their economic activity is also of importance, to support them if they decide to start working in a new profession (eg. students of the University of the Third Age in Nowy Sącz who have been trained as elderly carers), or to prevent them from social exclusion (as



in the case of the Centre of Culture and Recreation) and providing options for updating their ICT skills (eg. The Academy of the Fullness of Life, and the S@S Programme).

Expectations of various stakeholders operating in the region are high. Regional institutions have ambitious plans, often undertaking measures to develop new programmes, project proposals and implementation of the life-long learning concept, which, however, are still insufficient in terms of creating an elderly-friendly environment, as has been indicated by the results of the small scale surveys completed by decision-makers who took part in the workshops. However, other actors should, and wish to be, active participants, including employers and organisations of employees, as well as elderly citizens, non-government organisations and the Universities of the Third Age. *Interest and awareness of the demographic changes are visible in the region, and many stakeholders want to be involved - to receive information, be treated as partners in discussions, and to take part in the creation of relevant developmental policies and strategies.*

Such an integrated approach constitutes a key element in achieving the planned objectives, as discussions must be held in a spirit of partnership between officials and practitioners, and must include standardised operation of the institutions involved in accomplishing the planned objectives. *The current opportunities that are enabled by the willingness of all parties to co-operate in order to adapt to the demographic changes must be maximised.* For instance, because regional institutions are able to raise awareness of the need to adapt to demographic changes, if there is a regional approach to demographic changes there is a need for the poviats and gminas in the region to: assist with the development-related work; accept the agreed priorities in the relevant areas; help to identify goals and the tools with which to accomplish them; implement means to learn how to use these tools and assist with appropriate resources (such as human and financial); identify risks; and learn how to monitor the overall process (including reference and target indicators designed to demonstrate the impact of the measures or their absence).

These aspects directly address opportunities to use EU funding, and encourage local support for leaders of change, involving the immediate society in the process of resolving problems and facing the inevitable challenges, rather than relying on the imposition of regionally-based activities. Societies undergoing transformation need to know that policies for their future have been planned, and to know that their specific town, gmina, powiat and region will be an attractive area in which to work and live. *Those municipalities that are experienced in resolving specific social issues (such as care for seniors and shared entrepreneurship between younger and more elderly people) could share their expertise and help to look for other alternatives or competitive solutions.*

Various levels of institutions, employers and employees (both senior and junior) should participate in the mutual learning process. However, all stakeholders should be assisted to find the best formula by which to exchange thoughts and experiences, to avoid assumptions that such processes will be self-organising. *Such forms of co-operation could be systemic in nature, in order to ensure that staff at a lower level will also know how to approach specific demographic issues, why certain solutions should not be implemented and which ones could be applied.*

*It is also worth taking a cross-regional approach in searching for solutions, by initiating co-operation with other regions* in order to avoid a lack of partnership links and the situation whereby one region is not aware of what is happening in another region. This can be remedied through implementation of inter-regional, inter-powiat and inter-gmina projects, rather than projects focused on one area only. It is not about establishing a partnership for one project, but rather about considering if there is a need for partners who can be helpful, whether or not all the stakeholders wish to co-operate with the various partners, and if it will be beneficial to all parties.

In order to accomplish the planned goals, *many stakeholders will have to contribute their efforts* - not just public institutions, but also employers who are responsible for the activities taking place at their workplace. These activities, including EU funded projects, delivered under public-private partnerships, and participated in by non-government organisations and citizens, could provide active options for meeting demographic changes, however, it is necessary to be aware that there could be barriers, including unwillingness to co-operate, and mistrust.

*Integrating various stakeholders to act towards one common goal strengthens development, an exchange of thoughts and experiences, and teaches different approaches to the same issues, enabling regions to act in a multi-threaded and multi-aspect perspective* (examples include the S@S project, Active Senior School, Public Library and the Poland-Germany Association). It may, however, be assumed that such an approach is also possible in other domains; in the white economy sector in particular, including public health care institutions, private partners, academic centres, clients, and organisations that represent patients in terms of medical as well as care-related services.

It is via this analysis process that the following recommendations are suggested, but more detailed recommendations with tools, measures and outcomes are presented in Annex 3 of this report.

**Low fertility.** *More solutions (which are available, innovative, flexible, and free or at least inexpensive) to reconcile work and childcare options are needed (not only in public/private institutions, but also in workplaces).*

Various options to support the reconciliation of work and childcare needs:

- a) From 6 months up to 2 years – crèches (utilising methods such as EU funds); new family childcare systems; home-care facilities for children; projects supporting informal childcare, such as “Be a grandmother/grandfather” or the “Time Bank” initiative.
- b) From 2 up to 6 years old – kindergartens should be widely available in each gmina, particularly in rural areas, and they should be open from 6am to 6pm or at least more flexible hours.
- c) Support to establish employer-based kindergartens in large-sized companies (of more than 250 employees) eg. Accelor Mittal, in the Philip Morrison company in Kraków.

**Population ageing.** *As the number of older people increases, there will be a need for tailored solutions, which take into account the population ageing phenomena and which will improve the quality of life for all citizens, including the older ones, in areas such as care, social activity, and education. Other areas of importance include transport and housing, but these are beyond the scope of this report. Three important areas of concern are:*

1. Care
  - a) There is a need to develop a better system of elderly care, based on current experience and utilising new technologies that can help make it possible for family (working) carers to reconcile work and care needs. There is also a need to organise innovative systems of elderly care for single older people (as has been accomplished in Lipinki).
  - b) Adjust existing institutions or build new ones which satisfy the care needs of older people (for example, the daily centres in Nowa Huta, and the Centre for Recreation and Culture).
2. Social activity
  - a) Organised social activities can help prevent older people from experiencing social exclusion.
  - b) Support initiatives, which aim to engage the potential within senior citizens to use in the Third Sector, such as volunteering.
3. Education

- a) Further developing education and encouraging life-long learning through means such as the Universities of the Third Age and the S@S, the Academy of the Fullness of Life, and the Senior na Czasie.
- b) There could be courses and training for people nearing retirement or early retirees, in new professions like: assistants to more elderly people; medical assistants; caregivers for older people; physiotherapists for older people; organising and providing activities for older people, which encourages cultural and social engagement.

**Migration – the positive migration trends (temporary and permanent) need to be retained in the region.** *Further support is needed of various educational initiatives, as well as business and investment opportunities in order to promote the region as an attractive place to work and live.*

- a) Develop good quality educational opportunities and programmes for younger people (both Polish and foreigners).
- b) Develop more work opportunities (eg. new business centres or new workplaces).
- c) Develop options for better lifestyles for seniors (through means such as the silver economy as outlined in the “Challenges of Małopolska” document).

**Employment - current employment rates for those living in Malopolska are not as high as they were prior to entering the EU.** *Creation of work opportunities and removal of barriers that impede work opportunities will help to increase employment in all age groups.*

- a) Apply methods used in the *Social Integration Club*, for those not currently undertaking employment (in community efforts such as public works, public utility work, or social co-operatives).
- b) Support projects and initiatives that support development of new business start-ups for everyone.
- c) Introduce a mechanism by which people aged over can work part-time on the basis of job-sharing and team-work (including mix of young-old workers).

**Age management practices – there is a lack of good age management practices, including health improvement programmes.** *There is a need to promote among employers the idea of age management practices that are adjusted to the specific needs of the particular sector or branch of companies and organisations.*

Support is needed for age management projects in larger (over 250 employees) and medium sized (50-250 employees) companies. Projects and initiatives that include elements of age management practices could be introduced, including: part-time retirement (part-time work combined with partial retirement benefits); reduction of working hours for older workers; training plans for older workers; individual career development plans; personal retirement plans; extra leave for older workers; a decrease in workload for older workers; ergonomic measures; options to adjust work types to suit the workers’ age; internal job mobility (changes of positions with similar wages and hierarchical standing, but with different tasks and responsibilities); continuous career development (long-term planning for each employee’s career, positions, and training); flexible working hours for all categories of workers, including parents and older workers - adjustment of work times to help meet their needs and commitments. [Based on the methodology of the ASPA project, see Conen et al. (2012), F. Frerichs et al. (2012) and the relevant report of the ASPA project (Frerichs & Lindley, 2011)].

**Negative perception of older workers.** *Efforts should be directed towards changing the negative image of older workers.*

- a) It is important to inform and convince people in various, innovative ways of the positive aspects of older workers. This could be done via projects in which younger and older generations can make films, write newspaper articles, or undertake blogs etc that are designed to show the advantages of different workers at different ages, at both the regional and local levels, which would then be disseminated among companies within Małopolska, and online.
- b) Attracting and interesting the younger generation in the positive contribution of older workers will help make a direct link for them with their own preparation for old age.
- c) Projects for employees could such as “I value being 50+ because...”.

**Lack of current and easily available data for monitoring demographic changes.** *There is a need to re-evaluate and re-design the current system of information and statistical data recording and availability at the regional and local levels, in order to make it a more useful tool by which policy makers at the different level of government can quickly identify and diagnose current trends and access additional analysis of needs and opportunities.*

- a) Supply missing expertise related to demographic changes and ageing at the local and regional levels.
- b) Determine which missing data could be easily obtained via existing statistical sources (eg. monthly reports, with annual projections could be provided to local level authorities) or key demographic data (eg. Fact Sheet newsletters).
- c) Decide which missing data are crucial for developing appropriate strategies to meet demographic changes, and organise research and/or analytical support to supply this lack. For example, annual employee reports, with additional information added to the existing records so that registers not only numbers of employees, but also their ages.

**Silver economy development opportunities.** *Preparation of more concrete action plans are needed to develop the silver economy in the region, together with better utilisation of the opportunities present in the white and green economies.*

Work on silver economy action plans needs to continue, directly based on the “Challenges of the Małopolska region” study (2010), which provides concrete suggestions for how, in what way, with whom, and when to promote the silver economy.

**Challenges to the health care sector and health care provision due to population ageing.** *(Refer Box 17).*

**Box 17 Recommendations related to the health, geriatric and long-term care identified within “Challenges of the Małopolska region” (2010).**

Introducing regulations and appropriate motivation for family doctors to use geriatric care recommendations and co-operate with geriatricians.

Requiring co-operation with geriatric clinics by primary health care physicians, especially for patients with multiple chronic diseases that are being treated by different specialists.

Strengthening the role of a geriatrician as a:

- consultant helping the family doctor
- consultant helping other specialist physicians in clinics and hospital wards
- attending physician in a geriatric ward
- consulting physician in health care and nursing care centres, hospices and social welfare centres.

Requiring information flow between physicians from hospital wards, especially from emergency care units, and the management and physicians from long-term care institutions; joint setting of goals for further care, geriatric consultations, and overall good communication on a regular basis. This could decrease the number of hospitalisations or reduce the length of time needed in hospital.

Creating and developing specialist medical clinics serving as geriatric care centres – *Senior Health Centres* – pursuant to the directional proposals contained in the draft ordinance of the Ministry of Health on the standards of geriatric care. Senior Health Centres should be initially located in the capitals of sub-regions (until 2020) and later developed within the network covering all poviats.

Identifying and evaluating long-term care needs in order to plan the development of the resources necessary to meet these within the voivodeships and poviats.

Improving co-ordination by:

- developing and implementing better flow of information to the patient between the providers of services
- developing a model of inter-sectional co-operation (health care and social welfare) based on the organisational relationship
- introducing an independent care co-ordination institution, in order to ensure automatic evaluation of the patients' needs and the services' qualifications to provide long-term care
- providing continuity of care, e.g. by introducing co-ordination of hospital discharge with support facilities at home or in a care centre.

Building quality control systems into the services provided in long-term care institutions by:

- setting a fixed implementation date related to meeting the standards of geriatric care
- introducing nursing and care standards as a basis for quality evaluation
- preparing a quality evaluation system of long-term care as a condition necessary for obtaining nursing insurance (insurance against dependency) and privatisation processes
- introducing a system for the evaluation of seniors' satisfaction with institutional and domestic care
- introducing a ranking for long-term care institutions
- creating a form of consumer rights' office, which could investigate complaints from people residing at care institutions or their families, and then undertake appropriate interventions.

Preparing long-term care services contract proposals for 3-year periods, including various categories of patients (with the amount of the contract to depend on the needs category of the patient).

Source: Wyzwania Małopolski ..., ed. S. Golinowska, 2010, pages 14-18.

**Stakeholder involvement.** *Co-operation between all partners/actors should be organised in a more systematic way, that will help to increase the willingness to participate with others and to undertake joint actions, rather than ad hoc actions that are the result of a single initiative or project. Integrating various stakeholders to act for one common goal strengthens local, regional and effectively national development.*

**Sharing knowledge.** *Those municipalities that are experienced in resolving specific social issues could share their experiences and expertise, and help other areas to look for alternative or competitive solutions. However, there would need to be concrete incentives in order to interest them in this process.*

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## ANNEX

## Annex 1 Key indicators

## Group 1: Demographic change

Table. 1.1 Population in the Małopolska region in the years 1995-2010.

	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Total	3190186	3197064	3206630	3215885	3217865	3229139	3236268	3237217	3252949	3260201	3266187	3271206	3279036	3287136	3298270	3310094
Male	1553753	1556621	1561542	1566012	1562504	1568160	1571426	1571472	1578790	1581768	1584312	1585917	1589177	1592828	1598066	1603967
Female	1636433	1640443	1645088	1649873	1655361	1660979	1664842	1665745	1674159	1678433	1681875	1685289	1689859	1694308	1700204	1706127

Source: Central Statistical Office, 2012

Table. 1.2 Population by economic age in the Małopolska region in the years 1995-2010.

	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
0-14	742184	726903	708252	687236	670572	650893	632650	614026	598501	581821	566163	550421	538719	532137	528096	526034
15-59/64	2006812	2020723	2041556	2064272	2075455	2098999	2119275	2135378	2160773	2178160	2194030	2207728	2219868	2225877	2231197	2233962
60/65+	441190	449438	456822	464377	471838	479247	484343	487813	493675	500220	505994	513057	520449	529122	538977	550098

Source: Central Statistical Office, 2012

Table. 1.3. Life expectancy in the Małopolska region in the years 1995-2010 at birth.

	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Men	69.2	69.4	69.7	70.6	70.5	71.3	71.7	72.1	72.1	72.0	72.3	72.5	72.5	72.9	73.1	73.7
Women	77.0	77.4	77.5	78.2	78.2	78.8	79.0	79.6	79.7	80.3	80.2	80.5	80.7	80.9	81.1	81.4

Source: Central Statistical Office 2012

Table 1.4. Population by working age categories in the Małopolska region in the years 2002-2010

	2002	2003	2004	2005	2006	2007	2008	2009	2010
Pre-working age (0-14)	23.8	23.1	22.4	21.8	21.3	20.8	20.4	20.0	19.7
Working age (15-59/64)	61.1	61.7	62.2	62.7	63.0	63.3	63.5	63.7	63.7
Post-working age (60/65+)	15.1	15.2	15.3	15.5	15.7	15.9	16.1	16.3	16.6

Source: Central Statistical Office 2012



Table 1.5. Demographic forecasts for the Małopolska region

	2012	2015	2020	2025	2030	2035
<b>Total</b>	3316560	3338024	3364660	3373299	3359478	3328741
<b>Male</b>	1605054	1614941	1628127	1632880	1626055	1611055
<b>Female</b>	1711506	1723083	1736533	1740419	1733423	1717686
<b>0-14</b>	518180	521411	535194	519488	476970	432025
<b>15-64</b>	2331288	2313444	2250239	2200344	2183077	2162059
<b>65+</b>	467092	503169	579227	653467	699431	734657
<b>Urban</b>	1612767	1610310	1605028	1592367	1569404	1540043
<b>Rural</b>	1703793	1727714	1759632	1780932	1790074	1788698

Source: Central Statistical Office, 2012

### Group 2: Declining Fertility

Table 2.1. Fertility rate in the Małopolska region in the years 2002-2010

2002	2003	2004	2005	2006	2007	2008	2009	2010
1.340	1.297	1.283	1.286	1.279	1.322	1.417	1.426	1.408

Source: Central Statistical Office, 2012

Table 2.2. Natural increase in the Małopolska region in the years 1995-2010

1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
8602	8049	6944	7502	5357	6615	5183	4496	3164	3755	3512	3955	4641	7125	7446	7416

Source: Central Statistical Office, 2012

### Group 3: Labour market challenges

Table 3.1. Employment rate (for ages 15-64) in the Małopolska region in the years 1995-2010

	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
<b>Total</b>	60.4	59.9	60.8	61.2	58.5	58.8	58.1	54.8	53.8	54.9	55.1	55.9	58.1	60.9	60.1	59.6
<b>Men</b>	66.3	65.4	66.0	66.6	64.5	64.4	63.5	59.4	58.2	59.9	60.4	61.6	65.2	67.8	66.7	66.2
<b>Women</b>	54.6	54.4	55.5	55.7	52.6	53.3	52.8	50.4	49.6	49.9	49.8	50.3	51.6	54.6	53.8	53.3

Source: Central Statistical Office 2012

Table 3.2. Unemployment rate by gender in the Małopolska region in the years 1995-2010

	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
<b>Total</b>	10.5	10.5	9.8	8.2	11.7	11.7	13.0	16.2	18.0	17.2	15.2	12.5	8.5	6.2	8.0	9.1
<b>Man</b>	10.2	10.4	9.0	7.6	10.3	10.4	12.0	15.9	18.1	16.0	15.0	12.6	7.6	5.2	7.6	8.5
<b>Women</b>	10.9	10.7	10.8	9.0	13.3	13.1	14.2	16.5	17.9	18.7	15.7	12.4	9.5	7.1	8.4	9.8

Source: Central Statistical Office 2012

Table 3.3. Unemployment by age groups in the Malopolska region in the years 2000-2010.

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
<b>TOTAL</b>	185152	213093	208175	208028	193579	178067	145261	112602	97813	130007	142221
<b>Up to 24</b>	66642	72912	67166	63642	55746	47394	34889	25761	25205	36240	39313
<b>25+</b>	118510	140181	141009	144386	137833	130673	110372	86841	72608	93767	102908
<b>25-34</b>	52051	60156	58351	59509	55172	50558	40854	30963	27655	37292	41399
<b>35-44</b>	42915	48505	46636	45353	41292	37665	30430	22657	18181	23091	24912
<b>45-54</b>	21974	29282	33010	35629	36446	36041	31902	25940	20249	24334	25600
<b>55+</b>	1570	2238	3012	3895	4923	6409	7186	7281	6523	9050	10997

Source: Central Statistical Office 2012

**Group 4: Older workers**

Table 4.1. Employment rate of those aged 55-64 by gender in the Malopolska region in the years 1995-2010

	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
<b>Total</b>	41.5	41.2	43.6	40.0	33.3	33.6	36.3	30.8	31.7	33.6	34.5	32.2	33.1	34.3	37.3	36.1
<b>Men</b>	46.5	47.1	46.4	43.8	41.9	39.2	40.9	35.7	37.1	39.3	43.6	41.3	43.7	44.9	47.4	47.8
<b>Women</b>	37.3	36.2	40.0	36.2	26.4	28.8	31.5	26.2	26.9	28.7	26.4	23.4	24.3	25.3	28.4	27.1

Source: Central Statistical Office 2012

Table 4.2. Participation in life-long learning activities of those aged 25-64 in the Malopolska region (training lasting 4 weeks)

2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
4.2	4.2	4.3	4.3	4.3	4.2	4.5	4.4	4.1	4.8

Source: Central Statistical Office 2012

Table 4.3 Employees aged 50+ by selected professions in the Malopolska region in the 4th quarter of 2009 (in thousands)

Total	Representative of local authorities, civil servants	Experts Professionals	Technicians	Office clerks	Personal service, salesmen	Farmers and related	Workers Craftsmen	Operators	Simple works
<b>253</b>	18	45	23	14	16	63	38	16	20

Source: Osoby powyżej 50.roku życia na rynku pracy w 2009 r., GUS, 2010.

Table 4.4 Employees aged 50+ by sectors, self-employed and working family member by gender in the Malopolska region in the 4th quarter of 2009 (in thousands)

	Total employees	In private sector	Self-employed	Working family member
<b>Total</b>	253	82	73	16
<b>Men</b>	144	56	48	.
<b>Women</b>	108	26	26	14

Source: Osoby powyżej 50.roku Życia na rynku pracy w 2009 r., GUS, 2010.

Table 4.5 Employees aged 50+ by education level in the Małopolska region in the 4th quarter of 2009 (in thousands and as a percentage share)

	High education		Post-secondary and secondary vocational		Secondary education		Vocational education		Gymnasium, primary	
	(,000)	%	(,000)	%	(,000)	%	(,000)	in %	(,000)	%
PL 2009	743	50.2	1131	38	237	23.9	1247	36.8	512	12.4
Małopolska 2009	51	47.2	64	31.4	14	19.9	97	31	27	9.6

Source: Osoby powyżej 50.roku Życia na rynku pracy w 2009 r., GUS, 2010.

## Annex 2 Małopolska (Kraków) workshop discussions

During the OECD study visit in March 2012, a regional workshop was organised with four Focus Groups in Kraków, Wawel, focusing on the impact of demographic changes on future regional and local development scenarios. The discussion aimed to include topics on employment and skills development in new areas of growth, developing the silver economy and entrepreneurs, sustainable local development models and shrinkage scenarios, services to the elderly, social inclusion and fertility rate policies, and implications for the labour market. Approximately 50 people from various institutions and organisations in Małopolska participated in the workshops, including representatives from regional and local authorities (city councils) of the labour market, regional development, social assistance and social policy institutions, older workers, employers, trade unions, chambers of commerce, head of hospital services, SMEs' associations, local development agencies, non-government organisations (NGOs), childcare managers, and women participating in EU projects. Representatives from the Polish Ministry of Regional Development were also present at the meeting (upon request, details of the event, the final agenda and the list of participants can be provided).

There were four workshops held, on the following topics:

- Labour markets and older workers: organisational approaches by businesses and trade unions.
- New business developments and entrepreneurship: the silver economy plus the white economy and the green economy.
- Sustainable local development models: the urban form, and social and financial implications of an elderly society.
- Social transformations: dynamics of social inclusion, family development and intergenerational solutions.

### *FOCUS GROUP 1: Labour markets and older workers: organisational approaches by businesses and trade unions*

In the discussion on older workers in the labour market, several issues were mentioned.

- Firstly, it was noted that the current overall situation in the labour market is not favourable for older workers because there are less jobs available, there is high unemployment (even among the young) and there are many pre-retirement options for certain professions, which also has an effect on low engagement of older people, not only in Małopolska, but in Poland generally.
- It was also felt that employers usually consider older employees as being less productive and more expensive compared to the younger ones. Additionally, older workers are in general less educated and also reluctant to change, therefore, retirement is considered as being an optimal solution for older workers.
- Moreover, the participants agreed that the situation is also different when someone is already employed and the necessity is to maintain such a person in their employment as long as possible, compared to when someone is trying to find a new job when they are older. In the first situation, keeping the older workers may be more profitable (older workers are more loyal), but on the other hand, employers usually think about additional costs such as extra sick leave. Usually, it is more profitable to employ young graduates than older people, even if the older person updates their skills through additional courses or special training etc. The situation also differs between small and large companies, as smaller ones will more often try to retain older qualified employees, while in bigger companies, the younger staff are seen as more attractive employees, because the most important consideration is the productivity that allows the company to be competitive.

- In general, there are a lot of negative stereotypes about older workers and old people. They are perceived as having poorer health, low levels of competency, low mobility, and lower qualifications than their younger counterparts. They are seen as being afraid of change, and unable to update their education and their skills. However, as was importantly noted, many of these stereotypes are not true, for example, statistically there is no evidence that older workers are more often on sick leave than younger people. Also, older workers are more loyal and provide more stable human resources for companies. Some customers actually prefer dealing with more experienced older staff.
- There is a lack of proper management culture in organisations, including age management measures such as mentoring, coaching, etc., and here the older workers could be engaged as teachers on practical issues. However, there are some incentives needed for older workers and also to interest companies in measures that aim to encourage intergenerational exchange of knowledge and experience between younger and older staff.
- The participants agree that there is a lack of coherent and stable state policy towards older workers. The instability of legislation is of crucial importance, as the insecurity of planned and possible changes in areas such as the pension system, is an additional risk for employers and employees alike, and does not encourage companies employ older people.
- The current actions are ad hoc only and there is a need to change/adjust the laws in areas such as creating financial incentives encourage people to continuing working until they are older (through the pension system, and in labour market regulations), both for employees and for employers.
- There is also a lack of solutions which take into account the situation of the so-called ‘sandwich generation’, who usually have to take care of dependent (elderly) parents and also grandchildren.
- There is a lack of institutions in which older workers can obtain information on employment opportunities. Some older people are actively engaged in job-hunting, but there is a general lack of support for better orientation towards the labour market possibilities.
- The four years of protection for older workers regulation was discussed, as it is perceived as problematic. The employers would like to limit and/or stop this option. On the other hand, employees prefer to have such a right, as people are often dismissed before this period and then it is very difficult for older unemployed people to find a job. However, many said that both employers and employees do not benefit from this employment protection scheme.

#### **Box Some key messages from Workshop Number 1**

1. There are a lot of negative stereotypes that make active ageing difficult to achieve, some of these include: older people are not ready for change; and they are sick more often than younger workers. On the other hand, some people said that ageing workers are reliable, stable and respectful members of staff. It became clear that actively helping older people within their jobs can have a high success rate. In addition, ageing workers in employment can play a crucial role in supporting different generations. This is not a one-way system; younger workers can also support older workers.

#### **Actions:**

- Increase awareness of the ageing society among employees and employers
  - Promote actions and programmes/projects which aim to eliminate negative stereotypes about older workers.
  - Promote measures at the company level now, which in the long-run will provide their own solutions for how to support different generations (older to younger, and younger to older).
2. It is important to recognise the potential of older people and not to focus solely on the (perceived) shortcomings. In addition, training and skill development should be adjusted to supply what older people need and want. This also holds true for specific programmes, as a lack of support, or setting up programmes that do not meet the actual needs of older people, means they will not succeed.

**Actions:**

- Organise training and skill development programmes and projects that are adjusted to older people's needs, wishes and abilities (physical and mental), based on individual approaches. This needs to be done with an in-depth understanding of the target group, which necessitates a change in perspective away from the current focus on training alone for those aged 50+ and those who, by age, are qualified for a specific project, but to consider:
    - Older employees (55+) from a specific sector, who are at risk of exclusion from the labour market (because of the sector, education or type of job), and to therefore offer them the most effective way of updating their skills (similar to the support provided for unemployed people via the Social Integration Clubs, but individually targeted at those who are still working).
    - Older unemployed people, utilising the tested and implemented systems utilised in Social Integration Clubs.
3. Some participants wondered if the current stance on older people in society is sustainable in the longer term. Once the effects of the global financial crisis cease to be felt, and with a strongly ageing population, skills shortages in the labour market could conceivably frustrate the region's further development.

**Actions:**

- Strategic thinking, not only at the regional level, but also at the poviát and gmina levels is crucial, and in addition to the strategic documents that already exist, alternative scenarios (negative, neutral and optimistic) must be considered, including cost-benefit analyses for implementation versus the cost of not doing anything. For example, the question could be put as follows: what will happen to the place X if there are approximately 50% fewer children in 10 years, then in 20 years and then in 30 years? What kind of impact will there be on the community?
- Include and engage the local society so that they are aware of the demographic changes and their potential impacts.

Source: OECD Kraków Workshop Focus Group

*FOCUS GROUP 2: New business developments and entrepreneurship: the silver, white and green economies*

- Defining an economy as “silver”, “green” and “white” is still a new concept, and not well recognised nor yet accepted. The silver economy can foster development of services and products for older generations not only in the “white” sector (hospital/elderly care) but also in the green economy (tourism, ecological/green initiatives), in education, and other fields such as culture. The “silver economy” can create a new style of life for people, through the use of new technologies and provision of a service sector for older generations (in areas including law, financial advice, psychological services etc.).
- The development of the silver and white economies, however, is hampered by the urgent need for adequate education and training in these sectors, and with the promotion of new jobs (in such fields as telemedicine, tele-rehabilitation and home care services), as there are still not sufficient qualified staff in the white sector. In addition to this problem, the staff already working in the white sector are under pressure, as they are physically overburdened and poorly paid.
- However, there it is possible to utilise the potential of older people for volunteer work, thereby enabling them to find jobs in these sectors.
- Several challenges were identified related to the development of these three sectors (silver, green, white economy) due to demographic changes. Mostly these were related to labour market regulations, current and future needs, the abilities of older generations, and the region's specificity.
- Systematic solutions related to the labour market are needed, such as changes in the current regulations (i.e. more stable laws, especially income and social security tax regulations for employers and companies). There is also a need to promote new jobs, including providing

incentives for employment, re-employment and staying in the workforce for as long as possible (i.e. financial incentives). The education system also needs to change, to better adjust to meet the new demographic challenges. Employers need to learn how to organise employees' workloads and work types based on their varied ages and abilities.

- Much depends not on regional level involvement, but on the national level government's proposals, regulations and actions. For example, there is a need to prepare a coherent national strategy designed to cover the systematic solutions and mechanisms needed to meet the consequences of population ageing. This document could be related back to *The Madrid International Plan of Action on Ageing*, United Nations, 2002. Additionally, however, regional and local strategies for demographic challenges are still required, which can be applied at the local level.
- There is a need for a media campaign across the national, regional and local media, to inform and raise awareness of the demographic changes, and to promote the vision of a society built on co-operation between younger and older generations; a society that embraces everyone, independent of their age.
- An increasing number of aged consumers have specific needs that have to be satisfied, not only in the health and care sectors, but while the market will recognise the demand, it also has to be prepared to satisfy the needs of older generations. For example, there are many possibilities in the areas of tourism and recreation, as well as art and culture, particularly in the Małopolska region, which could be tailored and targeted for older generations. However, this relies upon older people being able to access and having support to access these facilities, so requires sufficient funding and ensuring the health of older people.

#### Box Some key messages from Workshop Number 2

- It is important to differentiate between the levels of 'older', 'elderly' or 'aged', as their needs are also different:
  - 55+ older/senior worker
  - 65-75 young elderly
  - 75-89 elderly
  - 90+ senior elderly/aged.
- Various actions/projects/programmes need to have more specific age categories, and it needs to be recognised that some of people are already working, some are unemployed, and some are out of the labour market. It is important to determine if people are actively engaged and working based only on age factors, or if other criteria have an impact.
- Older workers face particular challenges to their continuation in the labour market, as employers' perceptions are that higher costs are associated with retaining older workers, due to issues such as more frequent sick leave, which is a significant cost for the employer, with little support from government financing.
- Job requirements continually change e.g. computer and communications technology, and regulations that need to be applied. These changes can be a barrier for older workers, as their connection with training is lower than that of recent graduates.
- In addition, physical changes and health deterioration are affecting areas of entrepreneurship, with diminishing capabilities being experienced by older craftsmen, who have to work for a longer time than previously, as there is no accessible workforce or replacements for their businesses.
- In order to support the development of the *silver* economy, new financial instruments are needed to encourage entrepreneurship by both older workers and the young aged. New professions can also be developed, such as 'assistants for cultural advice' or 'assistants to the elderly', to provide flexible solutions for elderly people. The silver economy could act as an umbrella strategy for engaging and activating elderly people.
- In order to support the development of the *white* economy, new professions are also needed, to help manage disabilities, diabetes, hypertension, smoking and mental health issues. The new health professions are fundamentally different from mainstream health-care's focus on 'curing' the patient. In an ageing society, the focus needs to be shifted to 'management of symptoms' and management of the

variability of symptoms. For example, more professionals are needed to develop monitoring systems and procedures for caring for people at home, and these systems need to be connected to rehabilitation services, or the use of telemedicine, which could be significantly expanded. Motivating health professionals to invest in their careers and to innovate is a significant challenge in the nursing area alone. There is also a generation gap in certain professions and a lack of flexibility and adjustment in the sector, which is already leading to problems as the region continues ageing.

**Actions:**

- Financing of projects that consider the advantages of telemedicine and telecare are required, especially at the more geographically distant local (gmina) levels, which do not have access to the cities' medical facilities. The primary aim could be to support those who live alone and those who cannot care for older family members because of work.
- Determining if such solutions could be organised via collaborations and under the joint responsibility of different actors, such as the Gmina's Centre for Social Policy, local health centres, private organisations, family members, and caregivers.
- Supporting the development of the *green* economy, by optimising recycling and waste treatment in hospitals. Also, linking in with tourism and leisure providers, to offer quality and healthy services to the silver customer.
- One concrete recommendation here could be support for projects/programmes within medical institutions such as hospitals, that encourage them to utilise environmentally friendly infrastructure, which allows better management of recycling and waste treatment. This would need to be carefully scrutinised and done well, with cost-benefit analyses of such changes undertaken to determine the overall impact for both the institution itself and for the environment.
- New professions will have to offer systematic solutions and provide new forms of insurance for older workers if it is determined that they take sick leave more often than younger workers.

Source: OECD Kraków Workshop Focus Group

*FOCUS GROUP 3: Sustainable local development models: the urban form and social & financial implications of an elderly society*

- Actions by local authorities and institutions must be based on an understanding of the accepted specific local and regional culture, values and traditions (eg. Miechów vs. Zakopane, where there are strong social networks in families).
- Demographic changes in the region should be perceived not as being an additional cost or requiring extra expenditure due to the dependency of older people,
- but as an opportunity to boost the local economy and enhance what can be a very attractive period of life for older people, which in its turn can create new jobs for younger people, including services for the older generation.
- Besides improving the economic situation of older people, the activity of non-government organisations and the Universities of the Third Age were evaluated by the local authorities as being a good means by which to engage the potential of seniors. However, the challenge is to change the image of old age as perceived by: local authorities; local societies; and by older people themselves. Unfortunately, concrete solutions as to how to effectively change the awareness and perception of older people were limited during the discussion.
- The key issue for local authorities is to organise care services for the older population now and in the future. The demand for these care services is guaranteed to increase soon and additionally, changes to the Polish family unit need to be taken into account, whereby more services are required from public institutions compared to previously, when the family was more able to provide the required care services. The need to provide stable financing of care services was raised, including at the national level, as well as the need to employ more staff in medical professions, including geriatricians. A general consensus among the workshop participants was



that, in addition to infrastructure investments, social integration activities for older people are necessary, but it is important to note that these need not involve major costs, for example, organising Senior's Days.

- At the local level, the main barriers to more effective actions by authorities are current administrative obligations, which limit options to change or adjust financial budgets in order to more effectively secure the needs of the society (for example, a shift from expenditure on education to a focus on services for older people or infrastructure to support the ageing society).
- The general conclusion of this group was that strategic documents, especially regionally based ones, are important at the local level, as they provide a focused direction for changes and potential actions, particularly regarding access to and usage of public funds, and also give priority to local management.

### **Box Some key messages from Workshop Number 3**

- Planning, with future demographic transitions in mind, is important for ensuring maximisation of benefits in the long-run.
- Integrated policy impact assessment tools, such as those utilised by the European Commission, referred to as 'impact assessments', may be referenced by policy makers in order to identify different options based on the demographic changes that are occurring (e.g., expenditure on younger people compared to older people).
- Also important in the decision making processes are consultations across different policy fields, (horizontal co-operation among different departments) and stakeholder engagement.

*Source: OECD Kraków Workshop Focus Group*

### *FOCUS GROUP 4: Social transformations: dynamics of social inclusion, family development and intergenerational solutions*

- Older people are just one group who are at risk of social exclusion in Poland generally, and within the Małopolska region specifically, not only because of the decline in the economic and financial situations, but also due to continuing revolutionary technological changes.
- In addition, it was noted that fertility rates are to a large degree determined by economic factors, such as the prevailing income tax system, lack of adequate tax deductions, and an insecure labour market situation, combined with the lack of the adequate infrastructure facilities for childcare. Taking this into account, it is fair to say that in Poland there is a façade of pro-family policy.
- Additionally, there are several current issues which show that overburdening and other problems are affecting Polish families. Parents engaged in work have little time for raising children, and so often leave the duty for the child's upbringing to grandparents. On the other hand, there is often a lack of intergenerational communication between grandparents and grandchildren, and this interaction in child-rearing could help improve this relationship, including the transfer of knowledge and an exchange of experiences between generations. Women in Poland are in a particularly challenging situation, because besides work, and taking care of children, they often also provide care or support for older family members. Thus, the issue of work and care reconciliation plays an important role in deciding whether or not to have a child.
- There are various solutions that could be used as active representatives of the third sector: local public institutions, authorities and older people at the local and regional level have plenty of ideas, best practices and the will to do something, as can already be seen in many of the projects and programmes in Małopolska. However, even if many non-government organisations are engaged in these activities, there is still a need to encourage more organisations that can engage seniors in a professional and adequate way, including in the smaller cities and villages within the region. In this area, the role and meaning of the social economy and social co-operatives in activating

socially excluded seniors should be evaluated again within the region. Another idea mentioned were “Banks of Time” (such as taking care of children when parents are at work).

- Despite the fact that local authorities are already engaged in various projects within the region, including via grant competitions for educational, integrating and activating projects targeting the older population, supporting the social economy, and launching many new activities, such as the "Kraków for seniors" portal, "Senior friendly places" action and Universities of the Third Age, it is very important to continue to co-ordinate and support these activities. This is the role of the authorities at every level, but is dependent on their willingness to co-operate.
- Participants indicated that the conscious, responsible and effective creation and implementation of social policy, particularly in relation to demographic change, is primarily the responsibility of the central, regional and local authorities. Local and regional authorities should systematically address the above issues and create conditions by which to develop grassroots initiatives, targeted actions for non-government organisations, and support innovative activities.

#### Box Some key messages from Workshop Number 4

- Given the relevance of achieving a good balance between family and professional life, it is worth exploring various kinds of opportunities to support families.
- Family support could possibly be better explored via projects that are not focused only on “mothers”, but the family unit as a whole, such as the project “parent friendly workplaces”.
- Working women with young children and ageing parents particularly need support, as they have a double burden in terms of care of their family.
- There is an urgent need to have government-supported solutions and also company measures that support the family unit, particularly those caring for children and ageing family members.
- The role of the social economy and social co-operatives in engaging socially excluded seniors should be reassessed in terms of implementing the changes in current regulations and requirements that could be more widely used and more effectively integrated for this group.
- Older women, whose skills are currently out of touch with the labour market and represent no value for younger people, so that the intergenerational transmission of knowledge and know-how seem difficult to realise, need to be supported within the working economy.
- A crucial question to ask in relation to the above: *Is the knowledge of these women really out of place in the market?* It is here that the sharing of traditional and intergenerational knowledge could be undertaken, especially in the context of the Małopolska region, which is well known because of its existing attributes such as the regional food industry (ecological products). Co-operation via new business start-ups and the entrepreneurship of younger people (who can promote ideas, services and products outside the region through support via their ICT skills) and older people (who can act as suppliers) can be a very effective way of attracting markets (including tourists) outside the region.
- There is also a challenge to find a way to show statistically at the local and regional levels the engagement and time spent by older people in various activities which they currently undertake, such as childcare, helping in the family business, volunteering etc.).

Source: OECD Kraków workshop Focus Group

#### Summary of the Workshops

In referring to the situation of older workers in the labour market, besides looking at the current situation, there is a need to think about the future and the potential impacts of demographic changes. Life-long learning is one option, but it needs more support and understanding from the employers’ side. Training and skills development need to be adjusted to meet older people needs and desires. There is an expectation that there will be better times after the effects of the global financial crisis are over, but this might throw into relief population ageing consequences, including skills shortages on the labour market, which might hinder the region's further development.

Concerning the silver, white and green economies - older generations should be perceived as consumers and so the development of new products and services should be taken into account and promoted in the region.

Shrinking cities and villages need to prepare for demographic change, and not only discussions are desired at this stage, but concrete actions at the local level are also needed, to secure a sustainable development for everyone, independent from age.

The unique opportunity for establishing and/or developing intergenerational solidarity is possible thanks to social co-operatives. These can be used as new ways of engaging citizens of various ages with various family situations (working mothers, families with children, and people entering retirement) to be supportive of each other.

The general conclusion from all four workshops in the Małopolska region was that, in the same way that discussions at the workshops were planned to be held on various topics, but ended up with similar themes and topics for discussion, so are there similar areas for change, which were mentioned at all four workshops, such as labour market regulations, and stereotypes about older workers and older people. The ageing population need not be seen as being a negative, as there are many ways older workers and retirees can be engaged in different spheres, but the support of adequate social policy programmes and strategies at various levels of government will be essential.

## Annex 3 Malopolska – Policy Recommendations

PROBLEM AND RECOMMENDATION with TOOLS	DETAILS
<b>DEMOGRAPHICS</b>	
<b>PROBLEM/ISSUE</b>	<b>Low fertility rates</b>
<u>RECOMMENDATION</u>	<i>More (available, flexible and free or at least inexpensive, innovative) solutions that will allow families to reconcile work and childcare are needed (not only in public/private institutions, but also at workplaces).</i>
TOOLS	<p>Developing various ways to support reconciliation of work and childcare:</p> <ul style="list-style-type: none"> <li>A) From 6 months up to 2 years – crèches (using financial support such as via EU funds), new family childcare systems, home care childcare facilities, projects encouraging informal childcare, such as “Be a grandmother/grandfather” or the “Bank of Time” initiative.</li> <li>B) From 2 to 6 years – kindergartens need to be widely available in each rural gmina, open from 6 am till 6 pm or flexible hours.</li> <li>C) Support for establishment of employers’ kindergartens in large sized companies (with more than 250 employees) – at least 5 year long projects are needed (eg. Accelor Mittal, in the Philip Morrison company in Kraków).</li> </ul>
INDICATOR	<ol style="list-style-type: none"> <li>1. Fertility rate (2010) – 1.408 (Małopolska) Aim: 1.6 (2016), 1.8 (2020) – (benchmark country - Finland)</li> <li>2. Number of crèches in Małopolska 35, in Kraków – 23 Aim: to increase the number of available crèches in cities like Kraków from 23 up to 30 (in 2015); and to develop the system of childcare in rural areas (like new crèches) even though there are smaller numbers of children attending.</li> <li>3. Pre-school education of children aged 3-5 Małopolska 64.1% (2011) in Poland 64.6% Urban 84.4%, Rural 47.9% <i>An exception is that some poviats have more than 100% of this indicator.</i> Aim: in 5 years increase the indicator to 70%, but not have any indicators of more than 100%.</li> <li>4. Preferably free, or at least affordable, pre-school education institutions (such as that financed by the EFS in Ochotnia Górna) Aim: at rural and difficult to reach gminas (particularly in the mountain regions), allow and support innovative childcare facilities.</li> <li>5. Kindergartens at workplaces in big companies (both public and private sectors) with over 250 employees. Currently, there are two such employer’s kindergartens that can be easily identified in Małopolska. Aim: out of 375 large companies, at least 10% to have kindergartens, with a minimum target of about 10 new companies/public institutions in 3 years</li> </ol>

	(e.g at/close to universities).
SOURCE for obtaining the indicators	Central Statistical Office: reports such as the “Report of Pre-school education in Małopolska” of the Marshall’s Office; co-operation between gminas’ departments of social policy, employers, and regional authorities responsible for EFS funds and city councils.
FINANCING	Additional re-allocation of funds at the central level to support gminas, and access to EFS funds.
OUTPUT	<ol style="list-style-type: none"> <li>1. New kindergartens and crèches</li> <li>2. New ways of organising childcare at difficult to access areas (predominantly distant rural areas).</li> <li>3. Employers’ kindergartens/crèches – establishment of new institutions, which can help employees with a reconciliation of work and childcare requirements.</li> </ol>
IMPACT	In the long-term, availability through low cost access to childcare facilities should bring about a positive impact on fertility through supporting parents in reconciliation of work and care demands.
RISKS	There is a decreasing number of the younger population and the arguments against suggested recommendations could be based on financial aspects (to save costs).
RESPONSIBLE INSTITUTIONS	<ul style="list-style-type: none"> <li>• All; .the priority is to convince policy makers responsible for childcare facilities - not only authorities but also politicians (at various levels of government).</li> <li>• Ministry of Labour and Social Policy need to be engaged if regulations require changes in the law at the central level.</li> </ul>
TIME	<p>Y1 – preparation of projects/initiatives/business plans of benefits/costs of each facility – preferably adaption of existing infrastructure</p> <p>Y2 – start</p> <p>Y3 – Y4 – monitoring and evaluation (on-going)</p> <p>Y 5 – evaluation and decisions regarding required follow-up</p>
Why such recommendations? Example from abroad	National studies for Nordic countries found a positive effect of childcare provision on fertility rates (Rindfuss <i>et al.</i> , 2010). They also found that <b>reductions in the cost</b> to parents of affordable, good-quality childcare can have a substantial effect on fertility rates, especially when childcare provision is widespread (Mörk, <i>et al.</i> , 2009). <i>Fertility rate of Finland: 1.8 (2011)</i>

PROBLEM AND RECOMMENDATION with TOOLS	DETAILS
<b>DEMOGRAPHICS</b>	
<b>PROBLEM/ISSUE</b>	<b>Population ageing - increased share of older citizens</b>
<b>RECOMMENDATION</b>	<i>As the number of older people will increase, there is a need for various and more tailored solutions, which will take into account population ageing phenomena and will improve the quality of life of all citizens, including the older ones, in areas such as care, social activity and education. But others area of importance include transport and housing (beyond the scope of this report).</i>
<b>TOOLS</b>	<p><b>CARE:</b></p> <ul style="list-style-type: none"> <li>- There is a need to develop the system of elderly care based on current experiences and with new technological possibilities designed to make it possible for family (working) carers to reconcile work and care, and to organise in an innovative way, elderly care for single older persons (like exists in Lipinki).</li> <li>- Adjust existing institutions or build new ones, which satisfy the care needs of older people (for example, daily centres in Nowa Huta, Centre for Recreation and Culture).</li> </ul> <p><b>SOCIAL ACTIVITY:</b></p> <ul style="list-style-type: none"> <li>- Social activities – which aim to prevent older people from social exclusion.</li> <li>- Support initiatives which aim to activate the potential of seniors and use these in the Third Sector (volunteerism).</li> </ul> <p><b>EDUCATION:</b></p> <ul style="list-style-type: none"> <li>- Develop education for older people, such as the Universities of the Third Age and other projects that already exist in Małopolska, for example: S@S, Academy of Fullness of Life, Senior na Czasie.</li> <li>- There could be courses/training for people around retirement age or recently retired, into new professions like: assistants to the elderly; medical assistants; caregivers of older people; physiotherapists for older people; organised activity managers for older people; or motivators for cultural and social activities.</li> </ul>
<b>INDICATOR</b>	<p><b>CARE</b></p> <ol style="list-style-type: none"> <li>1. New systems of care (including telecare) for the elderly at their home – projects/initiatives which support local development of such care systems are needed (note, no current data exists). AIM: in 5 years to have in each powiat at least one example of a successfully implemented elderly care solution.</li> <li>2. a) Approximately 600 people were waiting for long-term care beds in the region in July 2012. AIM: in 2015, reduce number of people on the waiting lists to 100; and to have no-one waiting by 2020.             <ol style="list-style-type: none"> <li>b) Number of daily centres in the gminas and city districts in which the % of visitors aged 65+ is more than 20% (eg. Nowa Huta, Miechów). AIM: increase relevant budgets by a percentage that is proportionate to the increasing older population.</li> </ol> </li> </ol>

	<p>3. Solutions for working elderly caregivers that could be promoted at the local, regional and national levels (in the workplace).</p> <p><b>SOCIAL ACTIVITY</b>  Initiatives for seniors at the local level could then be presented at the regional level, through a special interactive map of social events in the region, updated and presented interactively, and covering the gmina, powiat and regional levels. While currently there is the “Senior Friendly Places” system in Kraków, some other cities in Poland have a system where seniors receive an SMS with information about events that are coming up in their neighbourhood.</p> <p>Social activity programmes, which aim to reach older people who are socially excluded and experience loneliness, for reasons such as experiencing mobility difficulties in leaving their houses etc.</p> <p><b>EDUCATION/ICT</b></p> <p>4. Number of educational programmes that have options for educating people in new professions that are related to demographic changes (eg. University of the Third Age in Nowy Sącz).  AIM: it is difficult to obtain current data because there are separate systems for projects financed from the EFS, and from other sources. Each relevant organisation (eg. Universities of the Third Age or S@S), should have at least two education programmes, based on an intergenerational approach, for specific professions</p> <p>5. AIM: to have a similar percentage share of those aged 65+ using ICT and accessing the Internet compared to slightly younger generations (aged below 50), and also to not have differences between the three cities of the region and the rural areas.</p> <p><b>OVERALL:</b> utilise the Elderly Friendly Living Places Index used in our research (OECD suggestion)</p>
SOURCE for obtaining the indicators	e.g. For CARE: 1. Voivodship Office – Department of Social Policy and Department of Health 2. Regional Centre of Social Policy/Observation 3. Social assistance institutions, through collaboration with the National Health Fund.
FINANCING	<b>CARE</b> Gminas’ funding, NFZ, social assistance, private funds <b>SOCIAL ACTIVITY</b> Gminas, powiats, regional authorities, and private funds <b>EDUCATION</b> Ministry of Labour and Social Policy (programme: ASOS), Ministry of Regional Development, European Social Fund, Ministry of Education, Ministry of Health (if health related education), private funds (companies, programmes for non-government organisations, Universities of the Third Age).
OUTPUT	<b>CARE:</b> - Organised, effective and cost-based, co-ordinated systems of elderly care (as in the Lipinki gmina).

	<ul style="list-style-type: none"> <li>- Adjust existing institutions and/or new ones which satisfy the care needs of older people (like daily centres in Nowa Huta, the Centre for Recreation and Culture for Seniors).</li> </ul> <p><b>SOCIAL ACTIVITY:</b></p> <ul style="list-style-type: none"> <li>- Social activities/initiatives and projects (increased role of the Third Sector); more registered older volunteers.</li> </ul> <p><b>EDUCATION:</b></p> <ul style="list-style-type: none"> <li>- training/education programmes to be assistants to elderly people; medical assistants, caregivers for older person; physiotherapists for older people; activity organisers for the elderly; cultural and social activity enthusiasts; ICT professionals (Internet access and usage, and general computer familiarity).</li> </ul>
<b>IMPACT</b>	Improving the quality of life of older people and enabling better adjustment to demographic changes through infrastructure development, which will help to satisfy the needs of the older population.
<b>RISKS</b>	The focus on older people must not be to the exclusion or inequality of other people in society. If there is no carefully planned policy development for social engagement and training in alternative careers for older people, there is a risk that there will be social exclusion of older people and there will be more demands on the public budget to care for the elderly.
<b>RESPONSIBLE INSTITUTIONS</b>	Different actors in different domains. For example, in education: University of the Third Age, non-government organisations, local authorities, regional and national governments (such as the Ministry of Labour and Social Policy), and the co-operation of employers.
<b>TIME</b>	Varied according to different possible solutions.
International example	<b>CARE, SOCIAL ACTIVITY and EDUCATION:</b> refer different “best practices” (via AGE European Platform webpage, includes Polish best practices).



PROBLEM AND RECOMMENDATION with TOOLS	DETAILS
<b>DEMOGRAPHICS</b>	
<b>PROBLEM/ISSUE</b>	<b>Migration – retaining the current positive migration trend (both temporary and permanent) into the region</b>
<u>RECOMMENDATION</u>	<i>Further support of various educational initiatives as well as encouraging business/investment opportunities so as to promote the region as an attractive place in which to work and live.</i>
TOOLS	<ol style="list-style-type: none"> <li>1. Develop good quality educational opportunities/programmes for young people (Polish and immigrants alike).</li> <li>2. Create work opportunities (such as new business centres, new workplaces).</li> <li>3. Provide options for better living for seniors (refer to ideas for the silver economy in the “Challenges of Małopolska” document).</li> </ol>
INDICATOR	<ol style="list-style-type: none"> <li>1. Number of students (2010): 643 per 10 000 inhabitants Aim: to maintain this trend and through to 2015, have at least 640 students per 10 000 citizens.</li> <li>2. Number of businesses (2010): 1 001 per 10 000 inhabitants Aim: in 2015, to have 1 100 per 10 000 inhabitants.</li> <li>3. Numbers of newcomers/inhabitants/residents by age (data obtained from registers).</li> </ol>
SOURCE of indicators	Central Statistical Office
FINANCING	<ol style="list-style-type: none"> <li>1. Universities; Ministry of Higher Education and Science; regional programmes; as well as EFS.</li> <li>2. Business and investors (Małopolska’s Agency of Regional Development).</li> <li>3. Local governments at gmina and powiat levels – change in housing policy.</li> </ol>
OUTPUT	<ol style="list-style-type: none"> <li>1. Support for new, innovative, internationally recognised educational programmes for students in disciplines which could closely be linked with business (medicine, ICT, design) – market oriented and innovative.</li> <li>2. Projects/initiatives for universities and businesses to create new job options (including outsourcing among other options).</li> <li>3. Projects aimed at improving the quality of life (via medical infrastructure, housing, transport) and contests to determine the best residential gmina in Małopolska in the view of both citizens or promotion abroad..</li> </ol>
IMPACT	The Małopolska region is perceived as being a good region in which to live, however, much still needs to be done via concrete and co-ordinated actions. This will help to ensure that the perception of the region and local environment (green, not polluted) will be more valued.
RISKS	The economic situation will not be favourable for businesses, which in turn means reductions in employment. Universities will not be able to collaborate in educational projects with businesses. Legal requirements or procedures will be too slow/complicated/dependent upon central level decisions.
RESPONSIBLE	Universities; employers’ associations; private companies; businesses;

INSTITUTIONS	investors; local and regional authorities; central authorities (Ministries of regional development, labour and social policy, education).
TIME	Y1 – start projects 1), 2), and 3). Surveys about quality of life at local level and improvement planned in Y2. Y3 – introduction of changes, Y4 and Y5 monitoring/modification.
International example	For Kraków, study similar cities: Vienna, Munich, Hamburg, Utrecht. These cities are ranked as good places in which to live because of “high-class medical, recreational and leisure facilities” – EUROCITIES network.

<b>PROBLEM AND RECOMMENDATION with TOOLS</b>	<b>DETAILS</b>
<b>LABOUR MARKET</b>	
<b>PROBLEM/ISSUE</b>	<b>Employment rates for people in Małopolska are not as high as they could be or were previously.</b>
<b>RECOMMENDATION</b>	To create work opportunities and remove barriers aiming to increase the employment in all age groups
<b>TOOLS</b>	<ol style="list-style-type: none"> <li>1. Support projects/initiatives which allow new business start-ups for everyone, independent from age.</li> <li>2. Introduce mechanisms by which people over 60 can work part-time if they wish on the basis of shared teamwork (young-old).</li> <li>3. Apply methods used for example in KIS for people who are not currently active (in areas such as public works, public utility work, social co-operatives).</li> </ol>
<b>INDICATORS</b>	<ol style="list-style-type: none"> <li>1. In 2010: employment rate of people aged 20 to 64 was 65.7% Aim: in 2015, 70%</li> <li>2. In 2010: employment rate of people aged 55 to 64 was 36.1% Aim: in 2015, 42% (with a changing age range up to 67)</li> <li>3. In 2010: employment rate of people aged 65+ was 7.6% Aim: in 2015, 10%</li> </ol>
<b>SOURCE of obtaining the indicators</b>	Central Statistical Office – surveys, Regional Labour Office
<b>FINANCING</b>	To be explored
<b>OUTPUT</b>	<ol style="list-style-type: none"> <li>1. In each gmina of the Małopolska region, KIS initiatives can be disseminated and if possible implemented, through close co-operation with businesses/investors, rather than being labelled as “social assistance institutions”.</li> <li>2. Co-financing of new start-up businesses and entrepreneurship (additionally, in some areas this could be via intergenerational co-operation of younger and older people, particularly in rural areas, as local economy development actions).</li> </ol>
<b>IMPACT</b>	The higher employment rates in all age groups will have positive effects on the economic situation of the region (including the increase in GDP).
<b>RISKS</b>	Lack of agreement with certain solutions like decreases in social security contributions for employers; no co-operation between employers and employees and there is still a risk that those who work could still be at a risk of poverty.
<b>RESPONSIBLE INSTITUTIONS</b>	Regional labour office; employers; trade unions; investors and universities; as well as the Ministry of Labour and Social Policy; and Ministry of

	Finance.
TIME	Continuous efforts are needed.
International example	The “Initiative 50+” in Germany can be taken as an example

PROBLEM AND RECOMMENDATION with TOOLS	DETAILS
<b>LABOUR MARKET</b>	
PROBLEM/ISSUE	<b>Lack of age management practices, including those which focused on health prevention programmes.</b>
RECOMMENDATION	To promote among employers the idea of age management practices adjusted to the specific sector and particular branch of the company/organisation.
TOOLS	Support age management projects in companies; among both large (over 250 staff) and medium sized companies (from 50 up to 250 staff). Projects/initiatives, which include elements of age management practices such as: part-time retirement (part-time work combined with partial retirement benefits); reduction of working time for older workers; training plans for older workers; individual plans for career development; individual plans for preparation for retirement; extra leave for older workers; decrease of workload for older workers; ergonomic measures; age limiting irregular work; internal job mobility (change of positions for one with similar earning and hierarchy, but with different tasks and responsibilities); continuous career development (long-term planning for employee’s career, positions, and training); flexible working hours for workers (including parents, older workers, adjustment of work time to meet their needs and responsibilities). <i>Source: Based on the methodology of the ASPA project, see Conen et al. (2012), F. Frerichs et al. (2012) and relevant report of the ASPA project (Frerichs &amp; Lindley 2011).</i>
INDICATOR	It is difficult to obtain data on all age management practices at the regional level. There are some results available for Poland (Perek-Białas, Turek, 2011). Aim: at least 40% of large size companies to have a minimum of three age management measures from the OLWOF Index (used here in the OECD’s study)
SOURCE of indicators	Employer survey (as in ASPA)
FINANCING	Various sources, including employers, but also using EFS funds as incentives for projects aimed at age management/diversity including health prevention.
OUTPUT	Implemented age management practices in companies
IMPACT	<ul style="list-style-type: none"> <li>• Raising awareness of various possibilities for maintaining the productivity of older workers.</li> <li>• Due to health promotion and prevention, less sick leave taken by older workers, and changes in employers’ perceptions that older workers are less productive and ill more often than younger employees.</li> </ul>
RISKS	<ul style="list-style-type: none"> <li>• A lack of simple and available options by which to learn about age management practices, including a lack of trust and not being convinced that it is a profitable move for the employee and</li> </ul>

	<p>employer.</p> <ul style="list-style-type: none"> <li>• A worsening economic situation can explain the hesitation of employers to invest in employees even though ultimately this could maintain or increase their productivity.</li> </ul>
RESPONSIBLE INSTITUTIONS	Employers; HRM associations; HR managers; advisors; consultants; employees; trade unions; employers' associations; and institutions responsible for EFS funds (Ministry of Regional Development, Ministry of Labour and Social Policy; regional authorities who are responsible for social policy, labour markets, Regional Work Council and business centres.
TIME	Y1: call for projects on age management practices in companies Y2 - Y 4: continuation of projects
International example	Examples can be found on EUROFUND's webpage; the results of the ASPA projects are available in the <i>International Journal of Manpower</i> ; and reports of the project "ZYSK z DOJRZAŁOŚCI", from the Academy of Development of Philanthropy in Poland.

<b>PROBLEM AND RECOMMENDATION with TOOLS</b>	<b>DETAILS</b>
<b>LABOUR MARKET</b>	
<b>PROBLEM/ISSUE</b>	<b>Negative perception of older workers</b>
<b>RECOMMENDATION</b>	Efforts should be directed towards changing the negative image of older workers.
<b>TOOLS</b>	<ul style="list-style-type: none"> <li>• To inform and convince employers in various, innovative ways about the positive aspects of older workers. This could be through projects in which the younger and older generations could develop films, movies, newspaper articles, blogs etc, which will be disseminated among Małopolska's companies or online (projects designed to show off the advantages of various workers at the local and regional levels).</li> <li>• Attracting the younger generation will help them to make a direct link with their own preparation for old age.</li> <li>• There could be projects for employees such as "I value being 50+, or 55+ because..."</li> </ul>
<b>INDICATOR</b>	Share of employers who value younger and older workers in the same way (aim is to decrease the difference). OLWOF Index (used here in the OECD's study)
<b>SOURCE of indicator</b>	Employer survey about older workers (as a reference, do a similar evaluation of younger employees, less than 35 and 50 on various characteristics and skills), but also qualitative indicators (such as data from FGI with leaders of large sized companies in Małopolska), surveys of policy makers and experts in the labour market.
<b>FINANCING</b>	Co-funding, independent research institutions (universities) via research projects.
<b>OUTPUT</b>	Competition, dissemination actions, initiatives related to age-management projects.
<b>IMPACT</b>	Due to population ageing impacts, employers must be prepared to have more and more older workers in the workplace. Prejudices and stereotypes are factors that can have an influence on employer's decisions about workers, such as recruitment actions, lack of promotion etc.

RISKS	There is still a reluctance on the part of employers to trust in the effectiveness and usefulness of age management practices, as it is often assumed that such practices cost more and bring fewer benefits. As a remedy for this, there is a need to undertake evaluations and thus demonstrate the positive effects to everyone. More awareness is also needed among workers, as employees are often not aware of changes due to ageing, and they do not necessarily think about options to maintain productivity in their old age, often because there is a lack of awareness about this. If the economic situation worsens, the short-sighted perspective could win at least in the short-term.
RESPONSIBLE INSTITUTIONS	Employers (PKPP Lewiatan, Pracodawcy PL/Branches in region); trade unions (OPZZ, Solidarność); authorities and HRM associations; HR advisors – joint regional initiatives to promote better working conditions and age management for all workers.
TIME	Actions need to be ongoing.
International example	<ul style="list-style-type: none"> <li>• At the end of June 2006, a large number of unemployed people over the age of 50 were actively engaged, and about 10% of them were integrated into regular jobs. A broad range of new instruments were developed, such as “progressive wage subsidies”, “learning duos: young guides old”, regional employment and growth funds for demographic change, “best-ages-campaigns”, a special coaching scheme for business start-ups by older unemployed people, healthcare, housing and tourism projects. Refer also to the German initiative of “Perspective 50+” <a href="http://www.perspektive50plus.de/">http://www.perspektive50plus.de/</a></li> <li>• KIBNET is an organisation that supports employees and enterprises in obtaining IT qualifications, especially in advanced IT training systems, (AITTS), which is a system for vocational training in the IT sector, supported by the federal Ministry of Education and Research. New projects are needed to accompany the demographic changes in the ICT sector.</li> <li>• The social partners IG Metall and BITKOM support a new approach to age-based qualifications in the German ICT sector, developed by Fraunhofer Institut. Age-based qualifications are designed to tie in with experience, and learning new things in the context of work. It is not about back-to-the-classroom approaches, rather, the curriculum of work process-oriented learning is oriented towards typical work processes with individual working steps. The learner completes these work processes, accompanied by a coach, who reflects on and documents the work done. Different forms of media, such as books, e-learning etc. can be used. Classical exams are not conducted, but proof of learning is rather through the reflection of the learning process.</li> </ul>

<b>PROBLEM AND RECOMMENDATION with TOOLS</b>	<b>DETAILS</b>
<b>INFORMATION</b>	
<b>PROBLEM/ISSUE</b>	<b>There is a lack of current and easily available data monitoring</b>

	<b>demographic changes</b> (eg. 50+/55+ workers by size of company and sector; number of 65+ in the total working population , and by sectors; information about LTC workers in regions; informal caregivers for older people (white economy); 65+ older entrepreneurship).
RECOMMENDATION	There is a need to re-evaluate and re-design the current system of information/statistical data at the regional and local levels to make it a useful tool by which policy makers at different level of government can quickly identify and diagnose current trends, with additional analysis of needs and opportunities.
TOOLS	<ol style="list-style-type: none"> <li>1. Determine what expertise is missing in relation to demographic changes/ageing at the local and regional levels.</li> <li>2. Decide which missing data could be easily obtained via existing statistical sources (such as monthly reports, with annual projections provided to local level authorities), key demographic data (Fact Sheet newsletter).</li> <li>3. Determine which missing data are crucial for developing adequate strategies for demographic changes, and organise research or analytical support, such as an annual employee report, with additional information from existing sources such as general registers (determining not only numbers of employees but also ages).</li> </ol>
INDICATOR	<p>Current regional indicators do not provide sufficient data by age and company size, sector, profession, or average exit age from the labour market and silver entrepreneurship.</p> <p><u>AIM:</u> To have updated and independent variable indicators.</p> <p>As an example, in the case of LTC indicators that are missing at the local and regional level:</p> <ul style="list-style-type: none"> <li>• Number of personal care workers</li> <li>• Long-term care workers</li> <li>• Formal LTC workers (head counts)</li> <li>• Formal LTC workers at home (head counts)</li> <li>• Formal LTC workers in institutions (head counts)</li> <li>• Formal LTC workers (total)</li> <li>• Informal LTC workers (head counts)</li> <li>• Long-term care recipients by type of care services</li> <li>• Long-term care recipients in institutions (other than hospitals)</li> <li>• Long-term care recipients at home</li> </ul>
SOURCE of indicators	Department of Health and Social Policy at the the Voivodship's Office, relevant departments in the Marshall's Office, relevant departments at local levels, Małopolskie Obserwatoria Polityki Regionalnej, Rynku Pracy i Edukacji., and the Central Statistical Office
FINANCING	Projects (financed from the EFS) for better support from authorities at different levels (eg. via technical support), existing resources of the authorities at different levels.
OUTPUT	Data which could be used in various programmes by various different policy makers (a database which enables better planning, monitoring and evaluation of policy).
IMPACT	Increased awareness of demographic changes and population ageing in the region, at the local level.

RISKS	<ul style="list-style-type: none"> <li>• Not enough financial resources to undertake additional analysis.</li> <li>• Not enough political will and understanding of why data is needed.</li> <li>• Lack of co-operation between the various institutions responsible for delivery, gathering, preparing and using the data.</li> </ul>
RESPONSIBLE INSTITUTIONS	Employees; employers; self-employed (information from Central Statistical Office); long-term care workers; including assistants to older people; nurses; caregivers; reports from institutions, including independent institutions.
USE OF LOCAL AND REGIONAL AUTHORITIES	Information about the number of LTC workers could be used in preparing budgets, including determining possible re-allocation of funds due to changes in needs, and better planning by taking into account cost-benefit analyses.
TIME	Y1 – expertise and evaluation Y2 – decisions and change based actions Y 3 – working system to be piloted in some gminas (combined with ADAPT2DC project or selected poviats). In the case of employment of older workers, the companies which use EU funds/structural funds could be used for the pilot, then it could be rolled out to all companies in the region (note there would be a need to check national regulations).
International examples	Development of the local, regional and national systems tracking population ageing, and demographic change is available in databases of OECD, Eurostat and WHO.

PROBLEM AND RECOMMENDATION with TOOLS	DETAILS
<b>SILVER ECONOMY</b>	
PROBLEM/ISSUE	<b>The silver economy is seen as an opportunity to be developed in Malopolska. Some documents related to the silver, white and green sectors already exist. There is a willingness to develop this further (as part of the Silver Academy project).</b>
<u>RECOMMENDATION</u>	<i>To prepare more concrete action plans for developing the silver economy in the region by using the opportunities of the white and green economies.</i>
TOOLS	To continue work on the silver economy action plans, which are more directly based on the “Challenges of Małopolska” report, which can provide concrete suggestions; how, in what way, with whom, and when to promote the silver economy.
INDICATOR	No data currently exists on the contribution of the silver economy to the regional gross domestic product.
SOURCE of indicators	Małopolska’s Observatoria and Central Statistical Office
FINANCING	Dependant on action plans that are presented later, but regional and local authorities could promote the idea of the silver economy; mostly private funding.
OUTPUT	Promotion of Silver Fairs or Fairs for 65+ (not 50+ as in other regions), Silver Academy, Context of Silver Entrepreneurship in Małopolska; promoting businesses of old-young with intergenerational co-operation.
IMPACT	This could provide a unique chance for the region’s development and its perception as a regional source of silver products and services, in this way attracting potential users outside the region.
RISKS	In this development, there has to be balance and policy directed towards all

	ages not only one specific group.
RESPONSIBLE INSTITUTIONS	Local, regional and business investors; private funding.
TIME	Detailed later.
International examples	<p>Project Goldenworkers - The main goal of Goldenworkers is to identify emerging technologies and socio-economic trends, new models for extending one's professional active life and novel application scenarios in the area of ICT for active ageing at work, leading to the definition of a state-of-the-art research agenda, fully embraced by research and practiced in the community.</p> <p><a href="http://www.goldenworkers.org/index.php/the-project">http://www.goldenworkers.org/index.php/the-project</a></p> <p>The SEN@ER - Silver Economy Network of European Regions is a joint initiative of European regions initiated by the region of North Rhine-Westphalia (Germany).</p> <p><a href="http://www.silvereconomy-europe.org/network/about_en.htm">http://www.silvereconomy-europe.org/network/about_en.htm</a></p>

PROBLEM AND RECOMMENDATION with TOOLS	DETAILS
<b>HEALTH CARE</b>	
<b>PROBLEM/ISSUE</b>	<b>Challenges of the health care sector and personal health care due to population ageing.</b>
<b>RECOMMENDATION</b>	In Małopolska, there is a parallel project currently being run on the challenges of the health care sector and health care due to population ageing "ADAPT2DC", see more at <a href="http://www.adapt2dc.eu/adapt2dc/Homepage.aspx">http://www.adapt2dc.eu/adapt2dc/Homepage.aspx</a>

PROBLEM AND RECOMMENDATION with TOOLS	DETAILS
<b>GENERAL</b>	
<b>PROBLEM/ISSUE</b>	<b>Information is spread out and quite often authorities at different levels of government do not know (or are not aware of) 'good' practices related to solutions to the ageing population issue, which could be suggested for others in the region.</b>
<b>RECOMMENDATION</b>	<ol style="list-style-type: none"> <li>1. <i>Integrating various stakeholders to act for one common goal strengthens local, regional and effectively national development.</i></li> <li>2. <i>Co-operation with all partners/actors should be organised in more systematic way – increasing the willingness to participate with others and building trust in order to undertake joint long-term or ongoing actions - not simply ad hoc actions that are the result of a certain initiative or individual project.</i></li> </ol>
<b>TOOLS</b>	Those municipalities that are experienced in resolving specific social issues could share their experiences, and help look for other alternatives or competitive solutions. There would need to be concrete incentives to interest the organisations in this process.



INDICATOR	Track the number of meetings/exchanges between gminas in which they discuss their solutions and their adjustments to demographic changes e.g. system of care for older inhabitants; buildings which could be adapted for use by seniors and senior's organisations, Universities of the Third Age or similar. AIM: bilateral study visits/meetings of civil servants of 50% of the gminas in the region (as a minimum). By 2015 – 60% of gminas are exchanging their experiences with each other.
SOURCE of indicators	Marshall's Office, Związek Powiatów Polskich, Voivodship Office
FINANCING	Regional funding via systematic projects/initiatives for joint collaborative exchanges of good and best practices, including international ones (a good case would be the further co-operation between the cities of Małopolska on social intergenerational dialogue, such as between Unna city in Germany, who can share their experiences with their partner city Nowy Sącz in Małopolska).
OUTPUT	Meetings, study visits and collaborations, joint projects (between at least two gminas).
IMPACT	Raising the awareness of demographic changes and potential solutions that could be applied and in what way (method of financing certain solutions, projects/public money) etc.
RISKS	No desire to collaborate and exchange their knowledge, their actions and decisions, for political and personal reasons.
RESPONSIBLE INSTITUTIONS	All institutions at the gmina, powiat and regional levels; support in specific projects from European funds, which should strengthen better collaboration and better governance.
USE OF LOCAL AND REGIONAL AUTHORITIES	In various ways, and as advice and learning processes grow, to improve the quality of life of citizens/inhabitants.
TIME	Y1 – call for joint projects, meetings and short study visits (1-2 days) Y 2 – realisation and new project sourcing, etc. Y 5 – evaluation and suggestions for changes (surveying various aspects, such as social policy).
International example	Not applicable.

**Annex 4 Workshop Participants**

Name	Organisation	Position
Mr Marian Augustyn	Elektrociepłownia Kraków	President of the Board
Ms Danuta Binek	Wojewódzki Urząd Pracy Zespół Zamiejscowy	Coordinator
Ms Ewa Bodzińska-Guzik	Centrum Informacji i Planowania Kariery Zawodowej	Manager
Ms Beata Krysiak	Tesco Polska sp. Z o.o.	Expert
Ms Gabriela Jabłońska	Sedlak & Sedlak	Expert
Mr Tomasz Kita	Fundacja im. Hetmana Jana Tarnowskiego	President of the Board
Mr Zdzisław Kwieciński	Małopolskie Stowarzyszenie Kupców i Przedsiębiorców	Vice-president of the Board
Mr Andrzej Martynuska	Wojewódzki Urząd Pracy	Director
Mr Andrzej Miutra	Małopolski Związek Pracodawców	Chairman of the Audit Committee
Mr Marek Piwowarczyk	Business Center Club	Chancellor of the Małopolska Region
Mr Mirosław Przybył	Małopolska Izba Rzemiosła i Przedsiębiorczości	Vice-president of the Board
Mr Wiesław Rajca	Wojewódzki Zarząd Zakładowy NSZZ Pracowników Policji	President
Mr Wiesław Rosa	Ogólnopolskie Porozumienie Związków Zawodowych	President
Mr Zygmunt Wójcik	Wojewódzki Związek Rolników, Kółek i Organizacji Rolniczych	Expert
Ms Krystyna Janecka	Małopolska Izba Rolnicza	Member of the Board
Mr Maciej Dudek	Naczelna Rada Zatrudnienia	Member
Mr Jerzy Smoła	NSZZ Solidarność Małopolska	Vice-president
<b>Focus 2: Silver, White and Green Economy</b>		
Mr Wiesława Borczyk	Ogólnopolska Federacja Stowarzyszeń UTW, Stowarzyszenie Sądecki UTW	President of the Board
Mr Tadeusz Burzyński	Instytut Turystyki	President of the Board
Ms Grażyna Leja	Hotel Dosłońce Conference & SPA	Expert
Ms Katarzyna Opoczka	Urząd Marszałkowski Województwa Małopolskiego	Inspector
Ms Anetta Okońska	Wojewódzki Urząd Pracy	Manager
Mr Mieczysław Pasowicz	Polskie Stowarzyszenie Dyrektorów Szpitali	President
Mr Piotr Tengowski	Izba Rzemiosła i Przedsiębiorczości	Member
Mr Jerzy Wrzecionek	Małopolski Związek Pracodawców	Member
Mr Jerzy Korczak	Lombard s.c.	Participant
Mr Ewa Piłat	Dziennik Polski	Participant
Mr Jakub Szymański	Urząd Marszałkowski Województwa Małopolskiego	Director

### Focus 3: Sustainable local development models

Ms Alicja Boryczko	Urząd Marszałkowski Województwa Małopolskiego	Inspector
Mr Wiesław Bury	Małopolska Agencja Rozwoju Regionalnego S.A.	President of the Board
Ms Wioletta Derymacka	ROEFS Nowy Sącz, Stowarzyszenie Inicjatyw Społecznych i Oświatowych CUMULUS	Expert
Ms Magdalena Jaśkiewicz	Urząd Marszałkowski Województwa Małopolskiego	Expert
Mr Jacek Lelek	Urząd Miejski w Starym Sączu	Mayor
Mr Dariusz Marczewski	Urząd Gminny i Miasta Miechów	Mayor
Ms Zofia Oszacka	Urząd Gminy Lanckorona	Voit of Lanckorona
Mr Marcin Pawlak	Urząd Gminy i Miasta Dobczyce	Mayor
Mr Andrzej Potępa	Starostwo Powiatowe w Brzesku	District Governor
Mr Andrzej Skupień	Starostwo Powiatowe w Zakopanem	Deputy District Governor
Mr Zdzisław Ścigaj	Urząd Miasta Trzebinia	President of the City Council
Mr Józef Tomal	Starostwo Powiatowe w Myślenicach	District Governor
Ms Joanna Urbanowicz	Urząd Marszałkowski Województwa Małopolskiego	Deputy Director
Ms Grażyna Wiatr	ROEFS Tarnów, Fundacja im. Hetmana Jana Tarnowskiego	Vce-president of the Board
Mr Marian Zalewski	Urząd Gminy Szczurowa	Voit of Szczurowa

### Focus 4: Social transformations

Mr Adam Białas	Miejski Ośrodek Pomocy Społecznej	Manager
Ms Marta Chlanda	Projekt "Praca przyjazna rodzicom"	Participant
Mr Zbigniew Chłap	Stowarzyszenie Lekarze Nadziei	President
Mr Janusz Grabiasz	Urząd Miasta Wydział Sportu	Inspector
Ms Małgorzata Lechowicz	Małopolski Urząd Wojewódzki, Wydział Polityki Społecznej	Director
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Ms Sławomira Walczewska	Fundacja Kobieta „eFKa”	President
Ms Wioletta Wilimska	ROPS Kraków	Director

Ministry of Regional Development and Experts		
Mr Przemysław Herman	Ministerstwo Rozwoju Regionalnego	Head of faculty for evaluation of HC OP
Mr Michał Sułkowski	Ministerstwo Rozwoju Regionalnego	Referendary
Dr Jolanta Perek-Białas	Warsaw School of Economics/Jagiellonian University	Local expert of OECD
Mr Piotr Stronkowski	Coffey International Limited	Expert of OECD
Dr Barbara Worek	Uniwersytet Jagielloński	Expert
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Dr Cristina Martinez-Fernandez	CFE / LEED	Senior Policy Analyst Project team leader
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Ms Naoko KUBO	Expert sustainable Development	Consultant
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Ms Roxana CHANDALI	Ministry of Interior and Kingdom Relations of the Netherlands	
Local Organiser		
Ms Barbara Porębska-Maciołek	Urząd Marszałkowski Województwa Małopolskiego	Inspector for evaluation of HC OP

## Annex 5 Note on contributors

Dr Jolanta Perek-Białas is a statistician and economist (PhD, 2001, Institute of Statistics and Demography, Warsaw School of Economics, Poland). She also graduated from the Practical French School of Management – The Special Polish-French Programme in Post-Graduate Study at the French Institute of Management. She was a participant in the Young Scientist Summer Programme in IIASA, Vienna, Austria (1997) and received a scholarship to study with Prof. Leslie Kish in the Institute for Social Research, University of Michigan, Ann Arbor, USA (2002). Dr Perek-Białas was also a fellow of the ERSTE Foundation under the Programme of the “Generations in Dialogue” in 2009-2010. Currently, she works at the Warsaw School of Economics and since 2001 also in the Institute of Sociology of the Jagiellonian University in Kraków, Poland. Since 1999, she has been involved in international projects under the 5th, 6th and 7th FP of UE related to active ageing policy and relevant topics: PEN – REF, ACTIVAGE, TRIPLE-DOSE and ASPA. Additionally, she has been active in projects financed by: the Norwegian Research Council of Science, VW Foundation and since February 2012, the OECD/LEED Programme. She is also an expert and advisor in projects on ageing issues at the national and regional levels in Poland (the institutions of the Małopolska region, the Ministry of Labour and Social Policy, and the Ministry of Regional Development). Her main scientific research interests include the socio-economic consequences of population ageing in Poland, and in selected Central and Eastern European countries, active ageing policy, reconciliation of work and care, and social exclusion/inclusion of older people.

Dr Cristina Martinez-Fernandez is a Senior Policy Analyst on Employment and Skills, Green Growth and South-East Asia at the Organisation for Economic Co-operation and Development (OECD), Local Economic and Employment Development (LEED) programme. She works on issues related to the challenges of skills and training systems for SMEs, entrepreneurial and innovation activities; industrial policy, climate change and the transformation of labour markets into the low-carbon economy; the challenges of demographic change and an ageing society for skills and employment development. Cristina also manages the OECD/LEED Initiative on Employment and Skills Strategies in Southeast Asia (ESSSA). Before joining the OECD, she was an Associate Professor at the Urban Research Centre, University of Western Sydney in Australia where she led the Urban and Regional Dynamics Programme which analyses industry changes, urban performance and socio-economic development within the frameworks of innovation, globalisation and the knowledge economy.

Dr. Tamara Weyman works as a contracted expert for the OECD, working on various projects involving employment and skills, SMEs’ development, South-East Asia, territorial development policy, and demographic change and sustainability. Recently, Tamara has been involved in publications such as ‘Martinez-Fernandez, C.; I.Miles; T.Weyman (2012) *The Knowledge Economy at Work: Skills and Innovation in Knowledge Intensive Services Activities*, Edward Elgar; Martinez-Fernandez, C.; P.Chorazy; T.Weyman; and M.Gawron. (2011), *The Territorial Dimension of the European Social Fund: A Local Approach for Local Jobs*, OECD; OECD (2012) *Skills Development and Training in SMEs*, OECD publishing; Martinez-Fernandez, C.; N.Kubo; A.Noya; and T.Weyman (2012), *Demographic Change and Local Development: Shrinkage, Regeneration and Social Dynamics*, OECD; and a chapter in a forthcoming book Schatz, L.; D.Leadbeater; C.Martinez-Fernandez; and T.Weyman (2013), ‘From “up north” to “down under”’: Dynamics of shrinkage in mining communities in Canada and Australia’ in *Stories of Tough Times: International perspectives and policy implication in shrinking cities*, Routledge. Tamara worked as a Research Associate at the Urban Research Centre, University of Western Sydney (UWS) and completed her PhD on Spatial Information Sharing for Better Regional Decision Making in 2007 at UWS. Since 2009, Tamara has been involved in the COST Action TU 0803 “Cities Regrowing Smaller”.



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