



WYRÓWNYWANIE SZANS  
NA RYNKU PRACY DLA OSÓB 50+

# An Analytical Report

on Programmes for People 50+  
Implemented in Poland between 2004 and 2009

Edited by Bogusława Urbaniak & Justyna Wiktorowicz



HUMAN CAPITAL  
NATIONAL COHESION STRATEGY



University of  
**LODZ**



MINISTRY OF LABOUR  
AND SOCIAL POLICY

EUROPEAN UNION  
EUROPEAN  
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Opinions and conclusions presented in this publication are opinions and conclusions of the authors and do not have to reflect the official position of the Ministry of Labour and Social Policy.

This publication has been developed as a part of the system project **Equalising Opportunities on the Labour Market for People Aged 50+**, conducted by the Human Resource Development Centre [Centrum Rozwoju Zasobów Ludzkich] partnered by the University of Łódź, initiated by the Department of Economic Analyses and Forecasts of the Ministry of Labour and Social Policy. The project is conducted as a part of Measure 1.1. "System Support to Labour Market Institutions" of the Human Capital Operational Programme.

Typesetting and graphics

Wydawnictwo Biblioteka

[www.wydawnictwo-biblioteka.pl](http://www.wydawnictwo-biblioteka.pl)

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Printed by

MAX DRUK Krzysztof Cempura

ul. Pachońskiego 5, 31-223 Kraków

Publication co-financed by the European Union within the European Social Fund

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ISBN 978-83-7525-599-7

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## Introduction

Various economic and social consequences of the ageing of communities, which Poland has to take into account as well, make the economic activity of people over 50 in the labour market one of the most significant issues raised in labour market research. The aim is to create a situation in the labour market in which all people able to work, regardless of their age, will also be able to find employment in the form and time which would guarantee the optimum use of their potential and enable them to derive satisfaction from worthy work for worthy remuneration. Subsequent generations of ageing “labour resources” will have to work longer and longer as it is necessary to accumulate retirement funds of appropriate value. Too great fiscal burden of young generations caused by the demographic ageing of communities, may reduce motivation for intensive work significantly, what, as a consequence, may be a factor of economic development slow-down. On the other hand, the period of people’s activity in the labour market is extended naturally owing to increased physical and intellectual fitness.

A solution to this may be an inter-generation cooperation supported by mutual understanding of needs and possibilities and based upon benefits derived from constant education recognised as an essential component of support for people over 50 in the labour market. There will be more and more people over 50 seeking employment because the practice of early retirement, which existed until recently, slowly expires. The demand of work in the advanced age increases; unfortunately, it is not accompanied with an equal interest of employers offering jobs to people over 50. Their attitudes are based upon misunderstandings and fears. They have a stereotyped approach to employees over 50 and they employ new people at this age unwillingly. The situation is even worse because the unemployed over 50 are usually poorly qualified. It is the most difficult to those people who lost their jobs for various reasons and do not have university education of profiles most demanded by employees. It is very difficult for this group of the unemployed to return to work.

The issue of economic activities of people aged 50+ is present in all countries. In many of them, energetic measures have been taken in order to maintain the employment rates of this group of workers or to include them in the labour market. More and more frequently, the issues of labour of people over 50 are raised in discussions at the level of the European Commission. They result in relevant provisions included in the European Employment Strategy. Situation in some countries is improving slowly. Poland is one of those in which the scale of changes concerning the economic activity levels of people over 50 is still far from satisfactory.

This publication is one of the results of activities taken by the Ministry of Labour and Social Policy aiming at the dissemination of the idea of equalising opportunities in the labour market in Poland to people aged 50+. The project *Equalising Opportunities on the Labour Market for People Aged 50+* is a part of Objective 1 “Improving working conditions and the propagating the employment of people over 50; age management” of the Programme “Solidarity across generations. Measures aiming at increasing the economic activity of people over 50”.

The main objective of the project *Equalising Opportunities on the Labour Market for People Aged 50+* is to promote economic activity of women and men over 50 and to promote actions for extending the period of economic activity of people at this age.

These objectives are reached through comprehensive activities which, in 2010–2013, will include the following:

- conducting extensive research and propagating its results;
- works of the national Thematic Network called “Rada 50+”, within which 5 Thematic Working Group have been created (for issues of health, education, labour market, women, and social policy). Rada 50+ is composed of representatives of central and regional authorities responsible for employment and social policies, representatives of the project Leader and Partner, and experts in relevant areas;

- nation-wide information and promoting campaign concerning economic activity of women and men aged 50+, including extensive activities, e.g. creating a multifunctional website with an educational module, information and promoting campaign in mass media, developing an information booklet for people aged 50+, and organising 18 conferences promoting economic activities of women and men aged 50+;
- conducting trainings for 630 employees of labour market and social welfare institutions with the blended learning method (traditional classes +e-learning);
- developing a textbook for labour market institutions and institutions of social assistance and social integration which would contain recommendations on professional mobilization of people aged 50+, including standards concerning model educational paths and professional training for people aged 45+/50+ as well as model recommendations for courses, trainings and other initiatives being a part of constant education for this age bracket;
- developing the Catalogue of Recommendations including proposals of system changes facilitating professional mobilization of people aged 50+.

This publication is a final report on research concerning programmes addressed to people aged 50+ completed in Poland in 2004–2009. The research was carried out by the University of Łódź, which is a Project Partner. The publication is one of many elements of extensive research which will be continued in 2011–2013 and will include (successively):

- field research including people aged 45+ as well as employees, labour market institutions, institutions of social assistance and social integration, and non-governmental organisations; this research will enable a thorough diagnosis of the current situation of this group in the Polish labour market;
- research on solutions promoting active ageing in chosen EU Member States conducted based on secondary data and information collected during study visits;
- continuation of research on programmes addressed to people aged 50+/45+ conducted in Poland in 2010–2012.

The main purpose of this publication is to reflect the actual state of activities taken in 2004–2009 aiming at equalising opportunities in the Polish labour market for people aged 50+. The report is a conclusion and assessment of activities which were completed at the latest in 2009. This results in the specific scope and way of presenting discussed issues. It was the intention of the Authors to present the results of research to date in a synthetic way. Therefore, despite the scientific nature of the research itself, the publication focuses mainly on application benefits of presented analyses, the main recipients of which will include labour market institutions (LMIs), institutions of social assistance and social integration (ISASIs), and non-governmental organisations (NGOs). This publication may also become a valuable contribution to further research on active ageing of communities. Private entities applying for EU grants for activities addressed to people over 50. (and over 45.) will also be able to find here a compendium of information on current activities within this scope and their conditions in Poland.

The publication analyses activities aiming at the extension of economic activities addressed to people over 45 and more, what is consistent with the direction of policy for extending economic activity of Polish people. This is a consequence of the need to prepare people entering pre-retirement age to new challenges, what will strengthen their position owing to new qualifications and competences; this will make it easier for them to remain employed. To the extent to which the relevant data was accessible, the analysis also included the 50+ group (Szatur-Jaworska 2006, p. 73). For greater consistency of analyses, the term of “people aged 50+/45+” was adopted for the research subject.

In the publication, the authors also use other expressions related to “elderly” people in the labour market. According to the glossary of the Central Statistical Office, working age is understood here as the age at which a person is able to work, i.e. 18–64 years for men and 18–59 years for women. Within this category, immobile working age is distinguished which is 45–64 years for men and 45–59 for women. Post-working age (equal to retirement age) means the period in which people usually quit working (65 and more years for men, 60 and more years for women). Pre-retirement age is understood as the last 10 years of the working age; this is the period pre-

ceding the moment of acquiring retirement rights directly (55–64 years for men and 50–59 for women). Near-retirement age is defined as the period between 50 and 65 for women and 55–70 for men (*Dezaktywizacja...* 2008).

The layout of the publication enables Readers to get acquainted with the following:

- the situation of people aged 45+ (including 50+) in the labour market in Poland in 2004–2009;
- legal circumstances of activating people aged 50+/45+ (including legislation changes after 2009);
- realisation of employment policy from the viewpoint of economic activity of people aged 50+/45+ in 2004–2009;
- activities conducted by public and private institutions, including non-profit institutions, aiming at the equalisation of opportunities for people aged 50+/45+ in Poland in 2004–2009.

The publication discusses national and self-governmental labour market programmes for economic activation of people aged 50+/45+. The analysis of activities addressed to people aged 45 and more conducted as a part of programmes co-financed by European Social Funds is particularly important.

The authors of the research would like to express their gratitude to employees of all institutions which joined the research on programmes addressed to people aged 50+/45+, in particular voivodship employment offices, marshall's offices and other units which played the role of intermediate bodies for operational programmes HC OP, SOP HRD, IROP, and CIF, and which play this role now. We would also like to thank the people conducting projects included in the research who shared their experience concerning giving equal opportunities in the labour market to people aged 50+.





# Part I

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Women and men aged 50+/45+ in the Polish labour market. Legal framework for support



## Introduction

The progressing aging of labour resources is currently one of the most important determinants of the situation in the labour market. Therefore, the assessment of programmes addressed to people in the advanced stage of their professional career should be conducted, taking statistic and legislation facts into account. This is the purpose of part I of the study *Women and men aged 50+/45+ in the Polish labour market. Legal framework for support*, which is an introduction to part II.

Part I consists of two chapters. Chapter 1 presents results of analyses of data from the labour market monitoring in Poland. Due to the assumed synthetic approach to the contents included in this part of the report, the authors limited themselves to present only results of research conducted based upon the most important information sources, i.e. administrative data of public employment services and the Labour Force Survey. The system of monitoring the labour market concerning the situation of people aged 50+/45+ was also assessed.

Another part of the report includes the most important legal instruments conditioning such programming and realisation of the employment and social policy which would facilitate giving equal opportunities in the Polish labour market to people aged 50+/45+. The authors presented and assessed legal instruments in force since 2004, extending their analyses to provisions which entered into force after 2009 as well. This is particularly important in the context of the proposed recommendations and enables the avoidance of possible dissonance between research conclusions, recommendations, and the currently binding legal system.



# Chapter 1

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Situation of people aged 50+/45+ in the Polish labour market — recommendations for monitoring of unemployment levels of people aged 50 and more

Introduction

- 1.1. Main demographic trends
- 1.2. Monitoring of the situation of people aged 50+/45+ in the Polish labour market
- 1.3. Assessment of the situation of people aged 50+/45+ in the Polish labour market in 2004–2009
- 1.4. Conclusions and recommendations



## Introduction

The purpose of this chapter is to synthesize results of research aimed at assessing the situation of people aged 50+/45+ in the Polish labour market in 2004–2009, focusing on the following issues: (i) demographic conditions of the situation of people aged 50+/45+ in the labour market, (ii) monitoring the situation of people aged 50+/45+ in the labour market, (iii) the situation of people in immobile working age in the labour market. Particular attention has been paid to people aged 50–59/64, whose situation in the labour market is special.

The main sources of information included administrative data on registered unemployment levels which enables structural analyses of unemployment levels of people aged 50+. Due to the fact that the scope of data for the 50+ group is too small, the research was extended to the next age bracket, i.e. 45–49. The aforementioned information source (administrative data) does not make it possible to conduct a wider assessment of the economic activity of people aged 50+/45+ (it registers data on unemployment levels only); therefore, the authors also used the results of the Labour Force Survey (LFS). Combined, both information sources enable the assessment of trends concerning as important indices of labour market condition as activity rate, employment rate, or unemployment rate pertaining to the discussed group<sup>1</sup>.

The main research was conducted on the nation-wide level and was supplemented with the analysis of spatial diversification of the discussed issues. The study is typically practical; therefore, statistical analysis has been limited to a synthetic description and assessment of dynamics in time of selected labour market characteristics.

This chapter will enable readers to: (i) collect information concerning the monitoring of the situation of people aged 50+/45+ in Poland (stating methodological differences between the most important data sources), (ii) obtain knowledge on the situation in the labour market of people at immobile working age, which is essential during programming and designing activities addressed to the unemployed from this age bracket (based on synthetic contents of the chapter and statistical data enclosed in the electronic form), (iii) setting future analyses in the context of the situation of this group in the labour market.

### 1.1. Main demographic trends

Demographic changes taking place in the society in the two last decades in particular, especially the aging of labour force, are key for the labour market in Poland. In 1995–2009, the number of people at working age increased by over 1.8 million; the group which grew most from 2000 to 2009 was the one composed of people at immobile working age — by 15.7% (refer to Table I.1).

The aging of society is influenced not only by the number of elderly people (women aged 59+ and men aged 64+) but also by changes in the size of the youngest group (0–17). In 2009, there were the total of 55 people at non-working age (25 people at post-working age and 30 people at pre-working age) to 100 people at working age. For comparison, in 1995, there were 23 people in post-working age to 100 people in working age; however, the dependency ratio for people at pre-working age was higher (45). Therefore, changes in the demographic dependency ratio<sup>2</sup> indicate that there are less and less beneficial relationships in the structure of Polish population according to age because the burden of elderly people upon working people increases more than the burden of children and young people. The latest forecast of CSO says that by 2035 the number of people at working age will be reduced by app. 3.9 million (down to 20.7 million from 24.6

<sup>1</sup> It should be emphasized that direct comparisons of results of analyses conducted based on data from administrative resources (MLSP) and LFS should not be carried out due to methodological differences. These issues are discussed with more details in section 1.2.

<sup>2</sup> Demographic dependency ratio is calculated as the number of people at non-working age to 100 people at working age (Kurek 2001, p. 97–113).

million in 2009) — refer to Table I.1. The culmination of reduction of this subpopulation (of 1.2 million) will occur in 2015–2020. In the perspective of the next 20 years, the burden of people at pre-working age and, in particular, post-working age on people at working age will change to worse. We will be able to notice a quick increase in the levels of dependency ratio starting as early as from the next decade, one which will result from the increase in the number of people at post-working age (in 2035, the dependency ratio is predicted to be 74; there will be 46 people at post-productive age and 28 people at pre-productive age to 100 people in productive age).

**Table I.1.** Trends of changes in Polish population divided into economic age groups in 1995–2035

Details	1995	2000	2004	2009	2010–2015	2015–2020	2020–2025	2025–2030	2030–2035
	number of people (thousand)				predicted changes in the number of people (thousand)				
Total	38284	38254	38174	38173	–75,9	–186,2	–391,8	–642,1	–803,0
at:									
pre-working age	10180	9333	8087	7253	–189,5	41,5	–143,0	–563,9	–620,5
working age	22809	23261	24240	24626	–852,8	–1215,2	–877,6	–370,6	–515,0
mobile (18–44)	15307	15281	15257	15323	–288,7	–933,0	–1249,5	–1198,4	–789,9
immobile (45–59/64)	7503	8043	8983	9303	–564,1	–282,1	371,9	827,8	274,9
post-working age	5295	5660	5847	6196	966,4	987,5	628,8	292,4	332,6

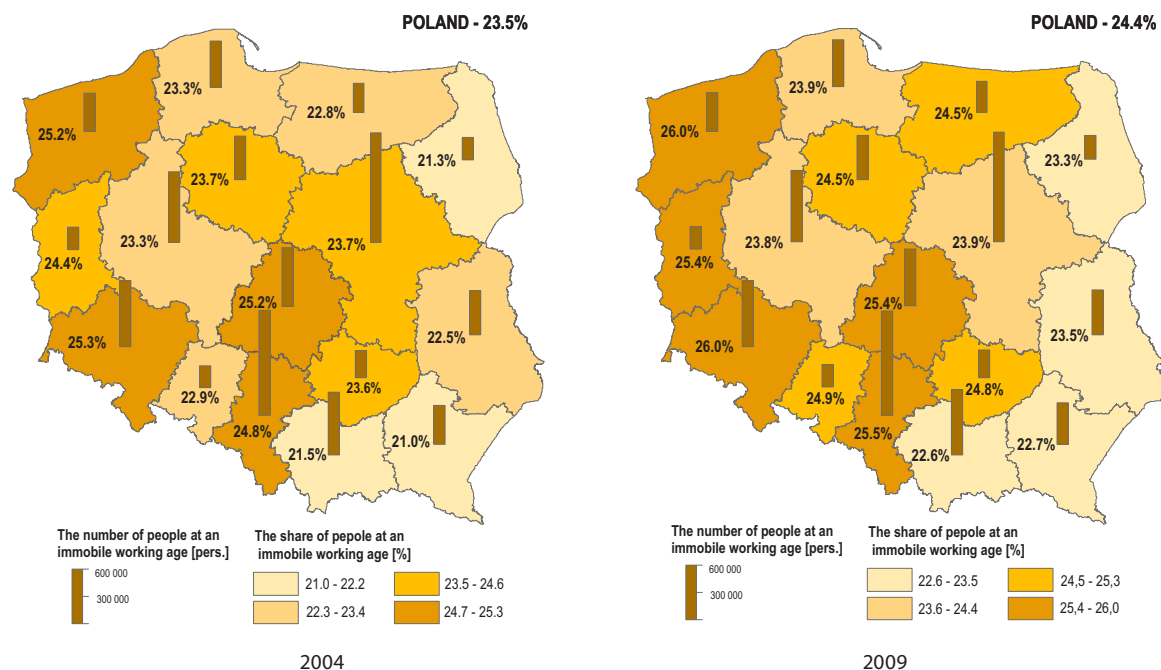
**Source:** The authors' own study based on [www.stat.gov.pl/gus/5840\\_646\\_PLK\\_HTML.htm](http://www.stat.gov.pl/gus/5840_646_PLK_HTML.htm) (as at December 10, 2010) oraz *Prognoza ludności na lata 2008–2035*, Central Statistical Office CSO, Warszawa, 2009, p. 191.

The issue of the aging work force discussed above is diversified in various voivodeships. A greater share of people at immobile working age was in 2004–2009 in the western and central Poland as compared to the regions of eastern Poland (see. Fig. I.1). In 2009, the most people at immobile productive age resided in voivodeships with the largest population, i.e. Mazowieckie and Śląskie. The share of people at the immobile age in the total number of people fluctuated between app. 22.5% (Małopolskie and Podkarpackie Voivodeships) to 26% (Dolnośląskie and Zachodniopomorskie Voivodeships). In all voivodeships, the number and the share of people at immobile age increased in the analysed period (2004–2009). Only in Łódzkie Voivodeship did the number of people in this age bracket decrease (by app. 5 thousand); however, this was mainly a result of the general downward trend concerning the number of people in this voivodeship.

In all voivodeships, there was a greater share of men in the pre-working age and mobile working age groups. Women outnumbered men in the immobile working age and post-working age groups.

**The increase in the burden of the subpopulation at post-working age on working people will be one of the most important challenges of the labour market in the next two decades.** Therefore, it is necessary to take intensive action aimed at increasing economic activity of Polish people, including the later leaving of the labour market (currently, the average age of women and men leaving the labour market and going into retirement is app. 59). As is indicated by research (Bukowski 2010, p. 36), until 2030 the greatest results may be achieved by increasing the activity of people at prime age (25–54), particularly women. In the further perspective, however, fertility and/or migration comes to the front and that determinates the significance of demographic policy. It is, therefore, necessary to adopt a comprehensive approach to challenges resulting from the aging of society. The programme “Solidarity across generations. Measures aiming at increasing the economic activity of people over 50” is an answer to these expectations. As a part of it, comprehensive activities are scheduled aimed at increasing the economic activity of Polish people nearing professional deactivation.





**Figure I.1.** People at immobile working age according to voivodeships in 2004 and 2009  
**Source:** The authors' own study based on CSO Local Data Bank, [www.stat.gov.pl/dbl](http://www.stat.gov.pl/dbl) (as at May 15, 2011).

## 1.2. Monitoring of the situation of people aged 50+/45+ in the Polish labour market

The monitoring of the labour market is a responsibility of local government units on the level of poviats and voivodeships, voivodeship and poviats employment offices, and Central Statistical Office.

Central Statistical Office collects data on the national labour market, its resources, and structure, based upon the Act of June 29, 1995 on Public Statistics (*Dziennik Ustaw* [Polish Journal of Laws] No. 88, item 439 as amended). The system of conducting statistical research concerning numerical characteristics of the labour market includes the following: (i) a series of research activities carried out by enterprises and public sector units, (ii) Labour Force Survey, and (iii) estimation of registered unemployment rate including reports of poviats employment offices. Furthermore, the issues of economic activity are included in national censuses, general agricultural censuses, studies of farm structure, and other social studies of households.

From the viewpoint of economic activity of people aged 50+/45+, the most important CSO source is **Labour Force Survey (LFS)**. It is a representative survey which includes people aged 15 and more<sup>3</sup>. LFS reports are published quarterly.

As is indicated in some studies (cf. e.g. Rokicki 2008; ASM, IBS 2009), data on the labour market made available by CSO are *the most complete, organised, and predictable*. Their undoubted advantage is the fact that the terms they use are consistent with recommendations of the International Labour Organisation (ILO) and, as a consequence, with international statistics, including Eurostat. The way of defining an unemployed person is of particular importance. According to recommendations of international statistics **LFS** recognises an **unemployed person** as a person aged 15–74 who meets the following three conditions: (1) he/she has not worked during the reference week, (2) he/she has been seeking employment actively for 4 weeks (including

<sup>3</sup> Detailed information on LFS methodology may be found in each edition of the CSO quarterly magazine *Aktywność ekonomiczna ludności Polski*. It is available in the website <http://www.stat.gov.pl> in the tab "Praca. Wynagrodzenia."

the reference week as the last one), and (3) he/she is ready to start work in the reference week or the following one. A person who has found a job but is waiting to start it (up to 30 days) is also recognised as unemployed. People who worked for at least 1 hour for remuneration, regardless from the formal status of their employment **are not recognised as unemployed** as well as those who helped (for no remuneration) with running a family farm or a family non-agricultural business activity or those who had jobs as hired workers or own-account workers but did not work (*Aktywność...* 2011, pp. 16–18).

Serious drawbacks of LFS data, in particular from the standpoint of policy programming (including the labour market policy) and the assessment of their realisation, include limited possibilities of structural analyses. Administrative data, collected by poviats employment offices, aggregated on the voivodeship level by voivodeship employment offices and on the national level by the Ministry of Labour and Social Policy, give significantly wider research opportunities. What should be emphasized most is a difference in the definition of the same notion. MLSP data on unemployment concerns **registered unemployment** and is based on **the definition of an unemployed person** specified in the Act on Promotion of Employment and Labour Market Institutions, hereinafter referred to as the Act on Promotion of Employment (uniform text: *Dziennik Ustaw* of 2008, No. 69, item 415, as amended, art. 2 sec. 2 item a-1)<sup>4</sup>.

The Act on Promotion of Employment treats people aged 50 and more as those whose situation in the labour market is special (art. 49 of the Act); thus, the characteristics of the unemployed aged 50+ are registered, such as education level, period of unemployment, service time, and reasons for de-registration from the unemployed data base. What is important, this data is available for the whole Poland as well as for each voivodeship. In addition, some characteristics of the unemployed are registered for the age brackets of 45–54, 55–59, and 60 and more. All data, including sex, is collected and presented by months.

Numerical characteristics of unemployment are made available in the website of Public Employment Services (PES) ([www.psz.praca.gov.pl](http://www.psz.praca.gov.pl), the tab “Statystyki rynku pracy”) and in official websites of individual VEOs and PEOs. They are reported monthly and some of them only quarterly.

The Information System of Public Employment Services Syriusz, which is now being implemented (in particular its module National System of the Labour Market Monitoring — NSLMM)<sup>5</sup> will enable more comprehensive monitoring of the labour market as well as the analysis of poverty and unemployment areas based on PES data. Owing to the fact that information on unemployment collected by all poviats and voivodeship employment offices are entered into the system, it will be possible to examine unit data of all beneficiaries and all employment offices. It will significantly facilitate the efficiency analysis concerning actions taken by public employment services in the labour market.

Some information on the labour market may also be obtained based on data collected by social welfare centres, Voluntary Labour Corps, employment agencies, Social Insurance Institution, and Agricultural Social Insurance Fund. However, this data is dispersed and often available only in the institutions mentioned above. Thus, activities conducted by labour market institutions aimed at developing a management system for information used by PES are even more beneficial. An example of these may be the system project implemented by Human Resource Development Centre titled “Management of Information Used in Labour Market Services” [*Zarządzanie informacją wykorzystywaną w usługach rynku pracy*]. As a part of the project, a management system for information used in labour market services is being constructed. The project includes developing a list of existing information sources, developing new methods of collecting, processing, and distributing information, and creating premises for an IT tool which would be consistent with the developed methodology. Interesting initiatives

<sup>4</sup> This definition is given in chapter 2 of this report.

<sup>5</sup> The Syriusz System is being implemented as a part of the system project titled “Implementation and Development of the Information System of Public Employment Services”, conducted by the Human Resource Development Centre. Access to the NSLMM data warehouse will be provided to authorized people in the Ministry of Labour and Social Policy, who will also be connected directly to the warehouse. A part of data from the warehouse will be available through the website of Public Employment Services.

in this area are also taken on the voivodeship level, examples of which include activities of the voivodeship employment office in Katowice.

Scope of data collected on the stage of monitoring the situation of people aged 50+/45+ in the labour market is quite wide. Research includes the most important demographic and social features, e.g. sex, service time, level of education, and, in the event of the unemployed, the period of unemployment. However, it turns out that **official data bases and studies based on the monitoring fail to satisfy the need for information of various groups of interest**. Due to the adopted criteria for sorting data, it is difficult to conduct analyses with sufficient details. The way of presenting data in tables with adopted constant values, which imposes the way of sorting on users, limits analytical possibilities. Therefore, it is possible to analyse economic activity of people aged 45+ (and possibly 50+), taking into account the criteria of sex and age brackets, but it is not possible to perform an analysis which would include one more feature (understood as the third dimension, i.e. sex x age x an additional feature), i.e. the level of education, which is significant from the viewpoint of developing employment policy to facilitate the equalisation of opportunities in the labour market for people at immobile age<sup>6</sup>. This is, undoubtedly, a disadvantage of numerical characteristics from the monitoring of the situation in the Polish labour market published as a paper version and online. This pertains to data on the national as well as regional level.

Assessing the system of monitoring the situation of people aged 50+/45+ and, more precisely, forms of presenting data from the monitoring, it is worth paying attention to **the inconsistent formula for processing data in reports concerning the situation in the labour market prepared by voivodeship employment offices**. Their analyses of unemployment of people aged 50+ or 45+ are conducted according to various typologies and in various cross sections, what does not enable the construction of a longer time series most frequently. Annual reports on the situation in the labour market in individual voivodeships take into account selected characteristics of unemployment of people aged 50+/45+ but their scope is unsatisfactory and limited mainly to fundamental characteristics, such as the number of the unemployed according to age (including 50+), and selected social and demographic characteristics of the unemployed aged 50+ (in particular, sex). Despite the scope of registered characteristics of the unemployed, which is consistent in all voivodeships, the developed reports use various analysis cross sections what makes detailed comparisons between voivodeships more difficult (in longer periods in particular).

The approach to monitoring the situation of people aged 50+/45+ adopted by the voivodeship employment offices in Warszawa, Toruń, Katowice, and Kraków may be deemed recommendable. Annual reports on the situation in the labour market published by these offices include various social and demographic characteristics of the unemployed aged 50+, e.g. the level of education, disabilities, place of residence (city/countryside), service time, the period of unemployment, and reasons for de-registering from the unemployed register. However, this data does not include longer time series.

**Comparisons concerning the situation in the Polish labour market of people aged 50+/45+ between voivodeships are more difficult due to inconsistent scopes of available information as well as adopted rules of distribution**. The situation on the poviats level is similar. Moreover, analyses of unemployment of people aged 50+/45+ in separate poviats based on **published** data are made difficult additionally by incomplete information. Some voivodeships (e.g. Łódzkie) have simple and easily accessible data bases which enable the generation of time series including monthly data from separate poviats. However, this is not a common practice; not all VEOs publish unemployment statistics concerning people aged 50+ in the local labour market or the form of their presentation makes it difficult to construct time series (only PDF files are available separate for each month). Thus, it is difficult to conduct comparative analyses of the unemployment of people aged 50+/45+ in time or space. However, taking into account the fact that this data is collected according to the same forms, the most important of which for the discussed

<sup>6</sup> It should be emphasized that the discussed analysis is possible for the whole 50+ group based on MLSP data (refer to. [www.psz.praca.gov.pl](http://www.psz.praca.gov.pl), Statystyki rynku pracy).

issues is *MPiPS-01. Sprawozdanie o rynku pracy [Report on the labour market]*, the **standardization of analyses is called for, at least concerning fundamental demographic and social characteristics of the unemployed aged 50+, starting from the poviats level.**

### 1.3. Assessment of the situation of people aged 50+/45+ in the Polish labour market in 2004–2009

#### People aged 50+ as a group with a particular labour market status

As was described in the preceding chapter, the situation of people aged 50+ as a group in a special situation in the labour market is monitored by public employment services within the scope of unemployment. In the light of this data, the number of the unemployed aged 50+ was reduced in 2005–2008 (from app. 440,000 to 318,000); however, in 2009 it increased up to app. 392,000. The share of the unemployed aged 50+ in the total number of the unemployed increased from 15.9% in 2005 to app. 21% in 2007–2009. Taking the lower retirement age of women into account, it is no surprise that there are less unemployed women; however, it should be emphasized that the rate of changes in the number and the share in the total number of unemployed of a selected sex is significantly higher in the event of men (refer to Fig. 1.2).

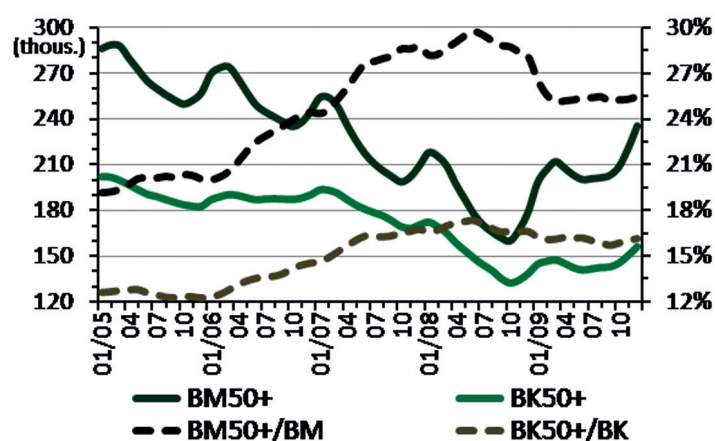


Figure 1.2. Number of the unemployed aged 50+ (the left axis) and their share in the total number of the unemployed (the right axis) according to sexes in Poland from January 2005 to December 2009 (%)

BM50+ — the number of unemployed men aged 50+, BM50+/BM — the share of unemployed men aged 50+ in the total number of unemployed men, BK50+, BK50+/BK — analogical variables for women

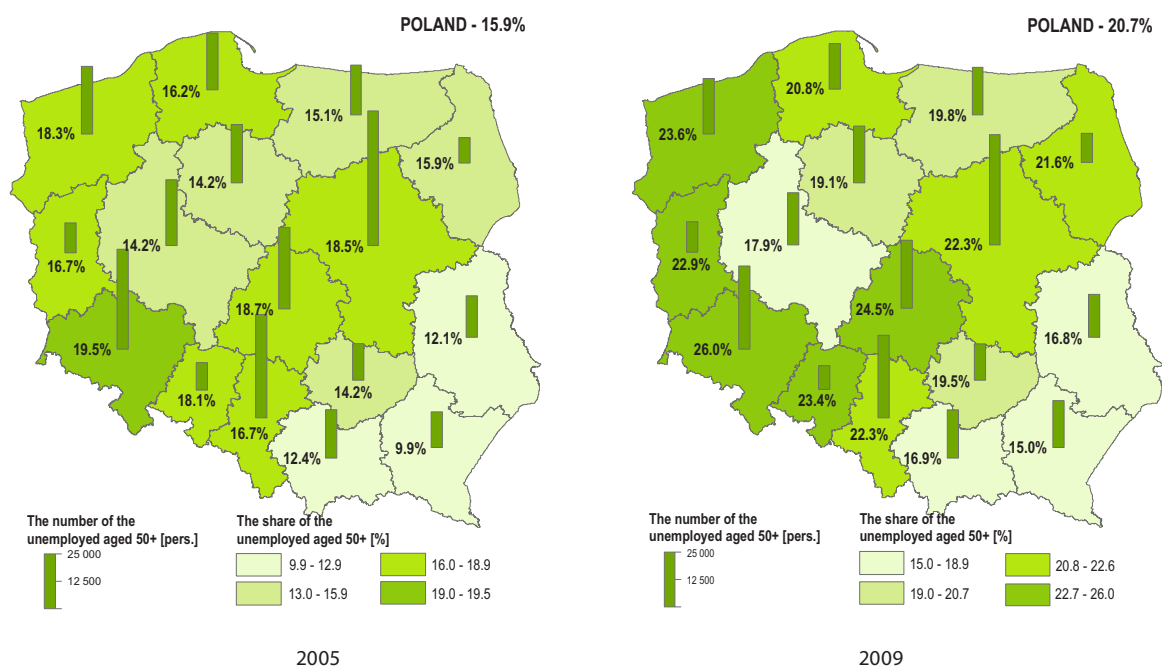
Source: The authors' own study based on monthly MLSP data.

Divided into regions, the number of the unemployed aged 50+ fluctuated in the reference period from 50,000 to 60,000 in Mazowieckie voivodeship; from 30,000 to 50,000 in Śląskie and Dolnośląskie Voivodeships; and from 9,000 to 13,000 in Opolskie, Podlaskie, Lubuskie, and Świętokrzyskie Voivodeships; what reflected, more or less, voivodeship data on the total number of people and the number of people at immobile age<sup>7</sup>. The largest **share of the unemployed**

<sup>7</sup> In Wielkopolskie or Małopolskie Voivodeships, where the number of people and the share of people at immobile age are higher or comparable with Dolnośląskie Voivodeship, the number of the unemployed aged 50+ is lower, one that would be rather more appropriate for Podkarpackie Voivodeship (CSO Local Data Bank). Among Voivodeships with the smallest number of the unemployed aged 50+, one may count, obviously, mainly voivodeships with small populations (Opolskie, Lubuskie) and voivodeships of eastern Poland, what is mainly the result of their agricultural character and, as a consequence, a larger scale of hidden unem-

aged 50+ in the total number of the unemployed was observed in Dolnośląskie and Łódzkie Voivodeships (app. 25%), and the smallest one — in Podkarpackie and Lubelskie Voivodeships (app. 15%) (cf. Fig. I.3).

Voivodeships of eastern Poland are leading areas of negative trends concerning changes in time in the labour market from the point of view of people aged 50+. Comparing Decembers of 2005–2009, it may be observed that in this region (in contrast with other areas) the number of the unemployed aged 50+ increased (by as much as 30%) as well as the share of the unemployed aged 50+ in the total number of the unemployed (by as much as 50%). The most advantageous trends of changes were observed in more urbanized voivodeships; the number of the unemployed aged 50+ was reduced most significantly (by app. 20%) in Wielkopolskie, Śląskie, Pomorskie, Zachodniopomorskie, Mazowieckie, Dolnośląskie, and Łódzkie Voivodeships. The share of the unemployed at that age increased least in Mazowieckie and Wielkopolskie Voivodeships. These regularities are related to many factors, including unfavourable changes in the structure of population according to age in eastern voivodeships<sup>8</sup>.



**Figure I.3.** Share of the unemployed aged 50+ in the total number of the unemployed in 2005 and 2009 (as at the end of a year, %)

**Source:** The authors' own study based on monthly MLSP data.

The issue of unemployment among people aged 50+ is the most acute in large cities (cities with the rights of a powiat), Łódź and Warszawa in particular; at the end of 2009 in these cities, the number of the registered unemployed aged 50+ reached app. 10,000, what was app. 32% of the total of the unemployed in these cities. The high share of the unemployed aged 50+ was also observed in powiats neighbouring the aforementioned cities, i.e. pruszkowski powiat (31.3%), warszawski zachodni powiat (28.6%), otwocki powiat (28.2%), pabianicki powiat (28.2%), and

ployment. As is indicated by research, it is in voivodeships of eastern Poland that the highest unemployment rate is observed, calculated in respect of people working in other sectors than individual agriculture, what indirectly proves that there is a high hidden unemployment rate among people in agricultural farms (MLSP, *Stan i struktura rejestrowanego bezrobocia na wsi w 2009 r.*).

<sup>8</sup> In voivodeships of eastern Poland, in a short period (2004–2009), the number of people at immobile working age increased by app. 8% (as compared to app. 3% in voivodeships from the other group) and the share of this group in the total number of people increased even by 2 percentage points (as compared to 0.2 pp. for Mazowieckie or Łódzkie Voivodeships). Therefore, absolute and relative changes in unemployment of people aged 50+ may not be connected only to worse and worse situation in the labour market of this group of people although trends of this type were observed as well.

łódzki wschodni powiat (27.8%)<sup>9</sup>. This is a consequence of demographic conditions; people living in cities (large ones in particular) are generally older than residents of the countryside (*Sytuacja...* 2008, p. 12). Therefore, the number (what is understood) and the share of people aged 50–59/64 are the highest in those poviats.

The number and structure of the unemployed observed in a specific moment are the result of multidirectional flows between the groups of the unemployed and working/employed people as well as the unemployed and those who remain inactive in the labour market. The description of the mechanism of their relations is the essence of the stream perspective for analysing the number and the structure of the unemployed. It is different from the resource perspective because it includes movements present in the labour market (Kwiatkowski 2002, pp. 28–46). Including dynamic elements in the analyses of the labour market condition extends the scope of research; its conclusions reinforce the statement that the unemployed aged 50+ are in special situation, describe the specificity of this group of the unemployed, and, what is more important, indicate possible directions of supporting changes in their unfavourable position in the labour market.

According to MLSP data, in December 2009 only, the group of the unemployed aged 50+ in Poland was joined by 44,400 people; however, at the same time 23,900 people left the group. Since 2005, both of these tendencies, **i.e. registrations (in-flow) and de-registrations (out-flow)**, systematically tended to increase although the out-flow was reduced in the event of the total of unemployed; there were also significant seasonal changes. In-flow to the unemployed group was distinctly higher in September each year and reached its height in January the following year; the out-flow was the least in December and January and the highest in April. March each year, sometimes even February, was the beginning of **the period of a revival in the labour market** which usually lasted until October; however, its intensity calculated with a difference between the out-flow and in-flow weakened distinctly with time. Therefore, the period of **March/April – October** is recognised as advantageous from the point of view of the labour market situation, also for the unemployed aged 50+. An exception was 2009, when the period of prosperity in the labour market lasted for only three months (April-June). Thorough research indicates that the described periods saw more than average (as compared to natural trends of changes in time) out-flow from total unemployment, including unemployment of people aged 50+, also in the group of the unemployed aged 50+ and, usually, the out-flow levels were higher than the in-flow levels.

Amplitudes of season fluctuations concerning the in-flow and out-flow to/from unemployment were significantly higher in the group of men than women. In the event of women, the highest peak of in-flow to unemployment was in January and July; this may be caused by the fact that employment contracts for specified time usually expire in the middle or at the end of a year. A high in-flow of the unemployed women was also observed in October what, as in the case of men, is related to the expiry of contracts for season works. The situation of women and men aged 50+ differed in various regions. The largest share of people aged 50+ among the newly registered unemployed in the period of reference is observed invariably in Opolskie and Dolnośląskie Voivodeships and the smallest one — in Podkarpackie and Lubelskie Voivodeships. The most stabilized situation was observed in Łódzkie, Mazowieckie, and Dolnośląskie Voivodeships. The highest amplitude of fluctuations was registered in Opolskie, Warmińsko-mazurskie, and Mazowieckie Voivodeships.

An important part of stream analyses of unemployment are **repeated registrations** as an unemployed person. MLSP statistics indicate that **most people aged 50+ registered themselves as unemployed at least for the second time** (in December 2009, it was 88.8% of men and 89.1% of women).

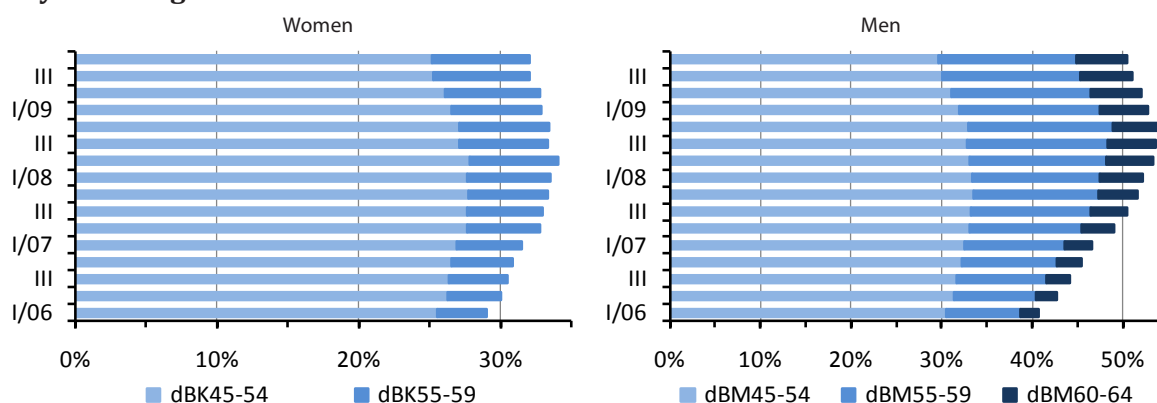
<sup>9</sup> Developed based on monthly data for poviats (based on VEO statistics and annual reports). It should be emphasized that data available in the CSO Local Data Bank concerning registered unemployment on the poviat level does not have the separate 50+ category (they concern groups aged 45–54 and 55 and more).

Other significant elements of the stream analysis, which are important from the viewpoint of identifying conditions and specificity of unemployment among people aged 50+ are described in the section titled *Main reasons of de-registering the unemployed aged 50+* of this chapter.

### Structural characteristics of unemployment of people aged 50+

Unemployment of people aged 50+ is particularly acute due to its **long-term character**, understood as remaining in the register of a poviast Employment Office for the total of over 12 months during the last 2 years<sup>10</sup>. As is indicated by MLSP data, at the end of 2009, the share of the long-term unemployed aged 50+ in the total number of the long-term unemployed was 18.6% and changed insignificantly in the period of reference (from the maximum of app. 21% in the first half of 2008). While the long-term unemployed constituted 40.9% in the total number of the unemployed in Poland at the end of 2009, **36.8% of the total of the unemployed aged 50+ were unemployed for at least a year**. However, the trend of changes in time in the number of the long-term unemployed aged 50+ was favourable; as compared to December 2006, this ratio **was reduced by over 25 pp.** (from 63.3% to the aforementioned 36.8%). Thus, the long-term unemployed aged 50+ were not over-represented in their age-bracket; furthermore, their number was almost halved while the total number of the unemployed aged 50+ was only reduced by app. 12%. Despite advantageous trends of changes in time, the long-term character of unemployment of people aged 50+ remains an important issue which must be taken into account by the labour market policy in Poland.

The analysis conducted based on the same data source (MLSP) for people at immobile age (divided into 5-years age brackets) indicated that the problem of long-term unemployment is more significant particularly among men aged 55–59 — refer to Fig. I.4. What is more, the following regularity may be observed: during periods of the labour market revival (seasonal, but relatively significant in the large scale), **the most significant out-flow from the group of the long-term unemployed of both sexes concerns the youngest people at immobile age**, i.e. those aged 45–49 rather than people in their fifties and older ones. The unfavourable *status quo* in the labour market of the latter groups, consisting in long-term unemployment, becomes stronger and stronger. The scale of the issue of long-term unemployment is proved by the fact that the number of **the long-term unemployed at pre-retirement age in Poland is app. the population of a city of average size**.



**Figure I.4.** The long-term unemployed aged 45+ and more as compared to the long-term unemployed in Poland, according to sexes and age brackets from the first quarter of 2006 to the fourth quarter of 2009 (%)  
 dBK45-54 — the share of unemployed women aged 45–54 in the total number of long-term unemployed women (analogical symbols for the group aged 55–59) and men (dBM) in separate age brackets

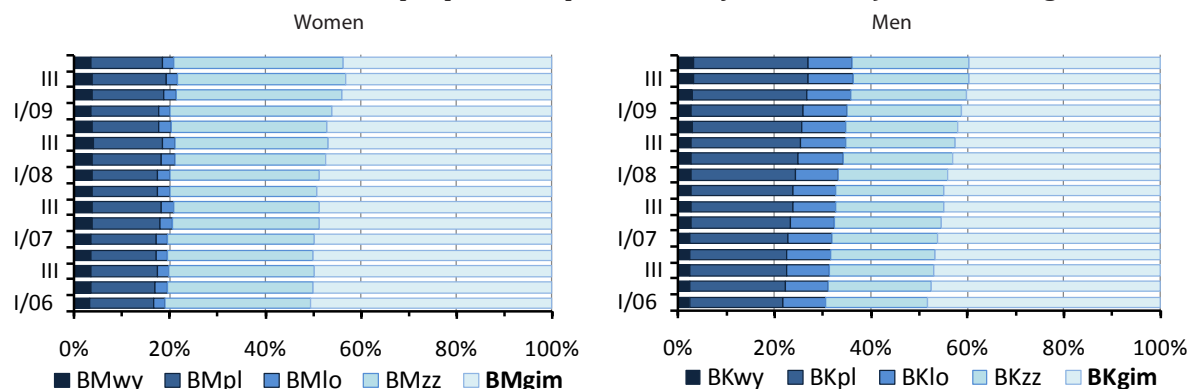
Source: The authors' own study based on quarterly MLSP data.

<sup>10</sup> Art. 2 sec. 1 item 5 of the Act on Promotion of Employment. The statutory definition of long-term unemployment differs from the one used in LFS, where the long-term unemployed are recognised as people who meet all criteria of ILO and Eurostat and who have sought work using at least one active method for a year and longer (12 months and longer) — cf. *Zasady metodyczne...*, 2008, pp. 46–47.

The analysis results concerning regional long-term character of unemployment of people aged 50+ (based on MLSP data) provide additional information on regions of eastern Poland. The share of the unemployed aged 50+ in these areas is among one of the smallest in Poland but the unemployment of people from this age bracket is mainly long-term. In Podkarpackie, Lubelskie, and Świętokrzyskie Voivodeships, **the share of long-term unemployed women in the total number of unemployed women aged 50+ exceeds 50%**. For comparison, in 2009 in Pomorskie, Wielkopolskie, Opolskie or Lubuskie Voivodeships, every fourth man and, more or less, every third woman remained in the unemployed register for at least 12 months.

The situation related to the long-term character of the unemployment among people aged 50+ improved distinctly as compared to 2006, when the share of all long-term unemployed aged 50+ in the total number of the unemployed at that age reached as much as 73% (in Wielkopolskie, Śląskie, Podkarpackie, or Warmińsko-mazurskie Voivodeships). What was reduced particularly, was the share of the unemployed for over 24 months, which reached as much as app. 60% in 2006 (in 2009, it was reduced down to app. 30–40%).

At the end of the fourth quarter of 2009, the largest groups of the unemployed aged 50+ were with gymnasium or basic vocational education at the most, what constituted app. 73% of the unemployed aged 50+. At the opposite point of this structure, there were the unemployed with university education, whose share in the total number of the unemployed aged 50+ was small (a few percent, while their share in the total number of people active professionally it was 25%) — refer to Fig. I.5.



**Figure I.5.** The unemployed aged 50+ according to the education level and sex in Poland in 2006–2009

BM — unemployed men, BK — unemployed women

Education levels: wy — university, pl — college and secondary vocational schools, lo — general upper secondary schools, zz — basic vocational schools, gim — lower secondary schools at the most

**Source:** The authors' own study based on MLSP quarterly data.

Education level of the unemployed aged 50+ is diversified in Poland according to regions. As is indicated by MLSP data, in 2009 in such areas as Warmińsko-mazurskie or Zachodniopomorskie Voivodeships, the unemployed aged 50+ with lower secondary education at the most constituted as much as a half of the unemployed from this age bracket (as compared to app. 37% in Małopolskie and Śląskie Voivodeships); however, the situation improved as compared to 2006. The highest reductions may be observed in Wielkopolskie (over 10 pp.), Podkarpackie, and Śląskie Voivodeships (over 8 pp.). On the other hand, in richer regions (Mazowieckie or Śląskie Voivodeships), the issue of the unemployed with university education is more significant; the share of the unemployed aged 50+ with university education reached app. 5% there as compared to the Polish average of 3–3.5% (for the period from the first quarter of 2006 to the fourth quarter of 2009).

As a lot of research indicates<sup>11</sup>, low qualifications, which usually do not satisfy the labour market needs and are not confirmed with suitable certificates, are one of the most important barriers

<sup>11</sup> Refer to e.g. Akademia Rozwoju Filantropii 2007, 2010a, 2010b, Bukowski 2010, *Dezaktywizacja...* 2008, Mazur (et al.) 2009, Manpower 2008, Perek-Biały (et al.) 2010, Urbaniak 2007a, 2007b, Wiktorowicz 2010, Wiśniewski 2009.



ers for people at immobile age, which makes it impossible for them to improve their situation in the labour market. One of the problems is the fact that the elderly are unwilling to improve their education. As is indicated by the research titled *Adults Education Survey* conducted in Poland as well, as little as nearly 7% of people aged 55 and more took part in forms of formal and informal education (analogical ration for the group of 25–34 was 34.1%) (Wiktorowicz 2010, p. 54).

### Main reasons of de-registering the unemployed aged 50+

Among many directions of the out-flow of the unemployed aged 50+, the most significant include taking up a job and a failure to confirm their readiness to work. At the end of 2009, de-registrations of the unemployed aged 50+ on account of their taking up a job constituted 30.7% of the total number of de-registrations concerning the unemployed aged 50+, while a failure to confirm their readiness to work constituted 35.5% of the total number of de-registrations in this age bracket. The discussed indices were diversified regionally and were subject to seasonal fluctuations. Out-flow from unemployment of people aged 50+ on account of their acquiring rights to retirement/disability pension or pre-retirement benefits was of significantly lower importance than the reasons listed above. In 2005–2009, out-flows owing to the acquisition of retirement/disability pension rights concerned 600–1,300 women and 400–1,400 men, what at the end of 2009 constituted only 1.4% (1.3% for men and 1.5% for women) of de-registrations; however, it was app. 10% of de-registrations concerning people aged 50+ (8.4% for men and 13.4% for women). It should be mentioned that, in 2005–2009, the share of the unemployed aged 50+ who received pre-retirement benefits increased app. three times or even over ten times in such regions as Łódzkie or Podlaskie Voivodeships.

The share of the unemployed aged 50+ de-registered because of taken up traineeships, trainings, and intervention works or public works fluctuated strongly depending on the time when beneficiaries of various programmes addressed to people aged 50+/45+ began their activities. At the end of 2009, the share of the unemployed aged 50+ de-registered after having started a training in the total number of de-registrations in this age bracket reached 2.2% (with the maximum share in October — 9.1%). Analogical ratio (the share of de-registrations for a specific reason in the total number of de-registrations in percents) for de-registrations because of starting a traineeship was 1.9% (with the maximum of 3.9% in June and September). In the event of intervention works, at the end of 2009, this ratio reached 2.1% (the maximum of 3.9% in April) and in the event of public works — 1.8% (the maximum of 11.2% in April). Among the instruments of active labour market policy for people in this age bracket, in 2009 professional preparation of the adults was of marginal significance (in the period from February to December the discussed ratio did not exceed 1%). In general, ratios of de-registrations according to specific reasons listed here are higher in such regions as Podlaskie, Podkarpackie, or Lubelskie Voivodeships. It may be supposed that this is a consequence of highly intensive actions (as compared to other voivodeships) co-financed by the European Social Fund in the eastern part of Poland. This issue will be discussed in the further part of the publication.

Available data indicate low participation of social welfare units in actions aiming at economic activation of the unemployed aged 50+. Instruments for helping people at the risk of social exclusion (including people aged 50+) were introduced with the Act of March 12, 2004 on Social Welfare (*Dziennik Ustaw* of 2009 No. 175, item 1362 as amended)<sup>12</sup>; however, as is indicated by MLSP data<sup>13</sup>, in 2009 in the whole country, only 354 people aged 50+ were de-registered as a consequence of participating in the trainings held by the Centre of Social Integration (CSI). This means that every fourth unemployed person de-registered because of his/her participation in activities offered by CSI is aged 50 or more. In addition, a territorial concentration of these activities may be observed; as much as 41% of all de-registrations on account of participation in CSI concerned three regions, i.e. Świętokrzyskie, Warmińsko-mazurskie, and Kujawsko-pomorskie Voivode-

<sup>12</sup> This issue is discussed wider in chapter 2.

<sup>13</sup> Refer to [http://www.psz.praca.gov.pl/Statystyki\\_rynk\\_u\\_pracy](http://www.psz.praca.gov.pl/Statystyki_rynk_u_pracy).

ships. However, as compared to other causes of out-flow from unemployment, de-registrations on account of participation in CSI are of marginal significance. Social welfare centres prefer to use other instruments, including community works (this also concerns the unemployed aged 50+). In total, in 2009, app. 23,000 unemployed directed to perform work of this type were 50+ (what is app. 35% of the out-flow from unemployment on account of works useful for the community). Lubuskie Voivodeship is particularly active in this field.

### Economic activity of people aged 50+/45+

According to LFS methodology, people are divided into economically active (the employed and the unemployed) and inactive. At the end of 2009, the number of Polish people aged 15 or more was 31,500,000, out of which 17,400,000 were economically active. The total of the employed (15,900,000) exceeded the economically inactive population (14,100,000) but there were only 112 employed to 100 economically inactive people<sup>14</sup>. Among the employed, 5,500,000 people (34.6% of the total of the employed) are at working age (45–59/64).

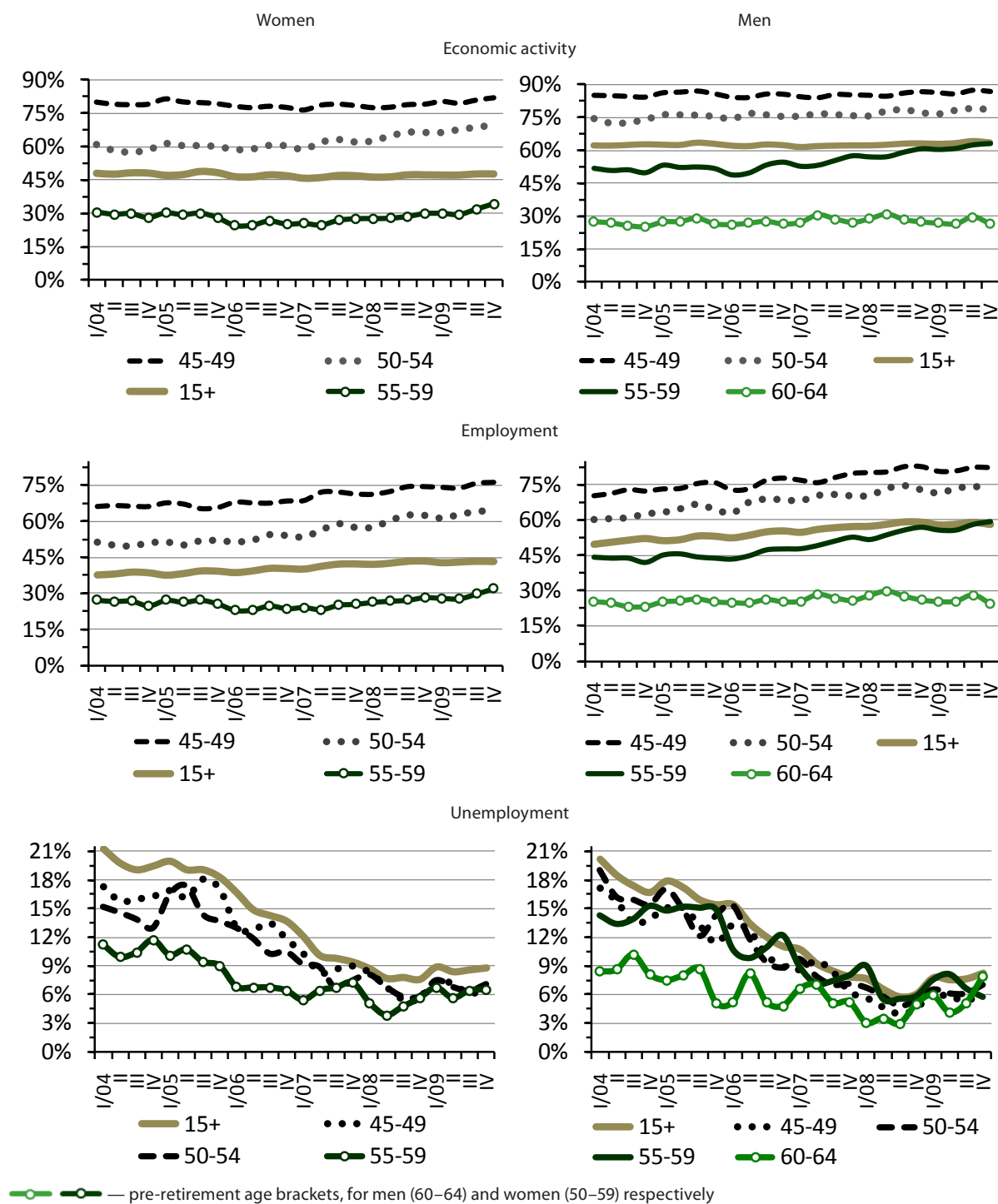
In the assessment of the situation of people at immobile age, synthetic labour market ratios are of particular importance, particularly **activity rate** (Waz), **employment rate** (Wz) and **unemployment rate** (StB)<sup>15</sup>.

In 2004–2009, a downward trend of unemployment rates could be observed for people aged 45–49 and 50–54 with more favourable values for men. In the event of people at pre-retirement age (55–59/60–64 lat), the unemployment rate went down faster; the reduction was the most intensive in 2003–2008. These regularities are sufficient proofs for the statement that the age of the unemployed is an important determinant of differences in unemployment rates. It should also be emphasized that the end of 2008 may be treated as a dividing line. The year of 2009 usually saw unfavourable changes in the levels of the discussed ratios, in particular for 5-years' age brackets of people aged 50+ — refer to Fig. I.6.

Since there is no comparable data, the analysis of economic activity of people aged 50+ according to voivodeships may not be conducted according to methodology used to date (as at the end of the reference period) but it has to be carried out based on average annual CFS data. They make it possible to obtain information on activity, employment, and unemployment rates directly or indirectly — refer to Fig. I.7.

<sup>14</sup> Unless it was stated otherwise, numerical data used in this section were obtained from quarterly publications of CSO from 2003–2009, i.e. *Aktywność ekonomiczna ludności Polski* (with all reservations concerning their incomparability resulting from modifications and corrections).

<sup>15</sup> Activity rate is a percentage share of economically active people in the total number of people in a specific age bracket; the employment rate is a percentage share of the employed in the total number of people in a specific age bracket. The unemployment rate is calculated as a ratio of the number of the unemployed to the number of economically active people in a specific age bracket. Definitions and methods of calculating these ratios may be found in *Zasady metodyczne...*, 2008, p. 21.



**Figure I.6.** Economic activity, employment levels, unemployment rates for men (the left part) and women (the right part) for the selected working age brackets in Poland in 2004–2009 (%)

Source: The authors' own study based on quarterly CFS data.

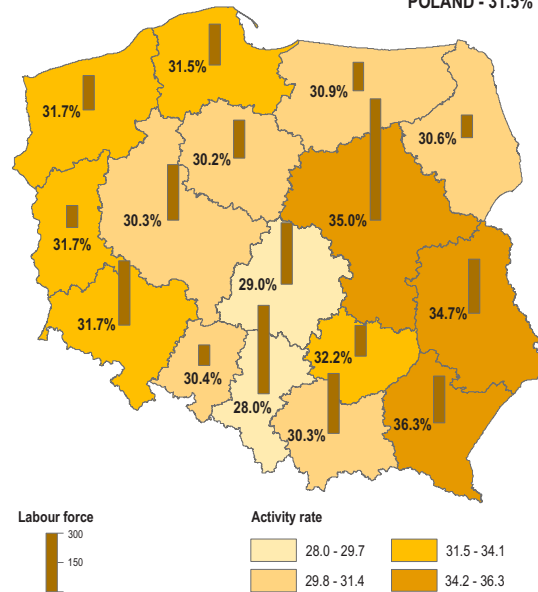
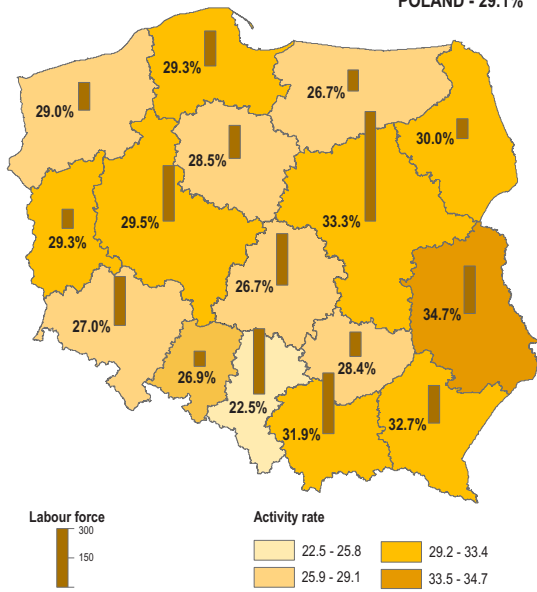
2004

2009

Economic activity

POLAND - 29.1%

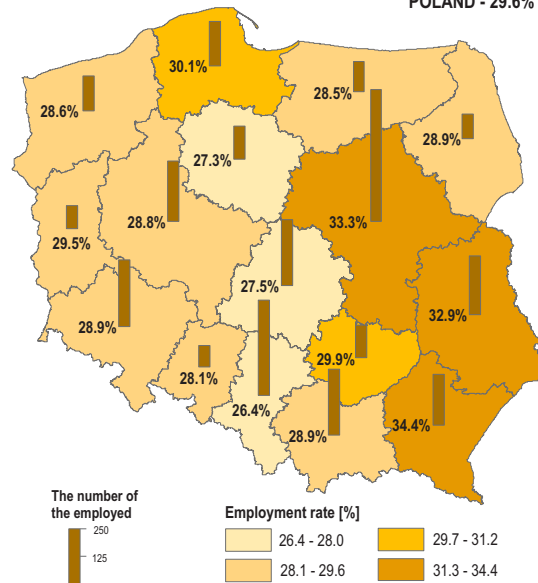
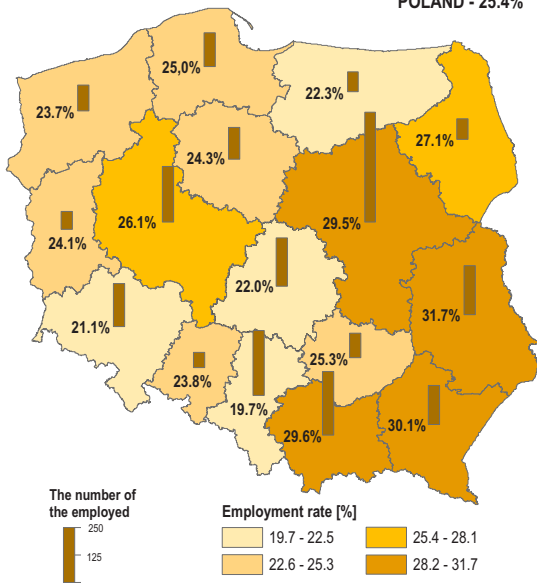
POLAND - 31.5%



Employment

POLAND - 25.4%

POLAND - 29.6%



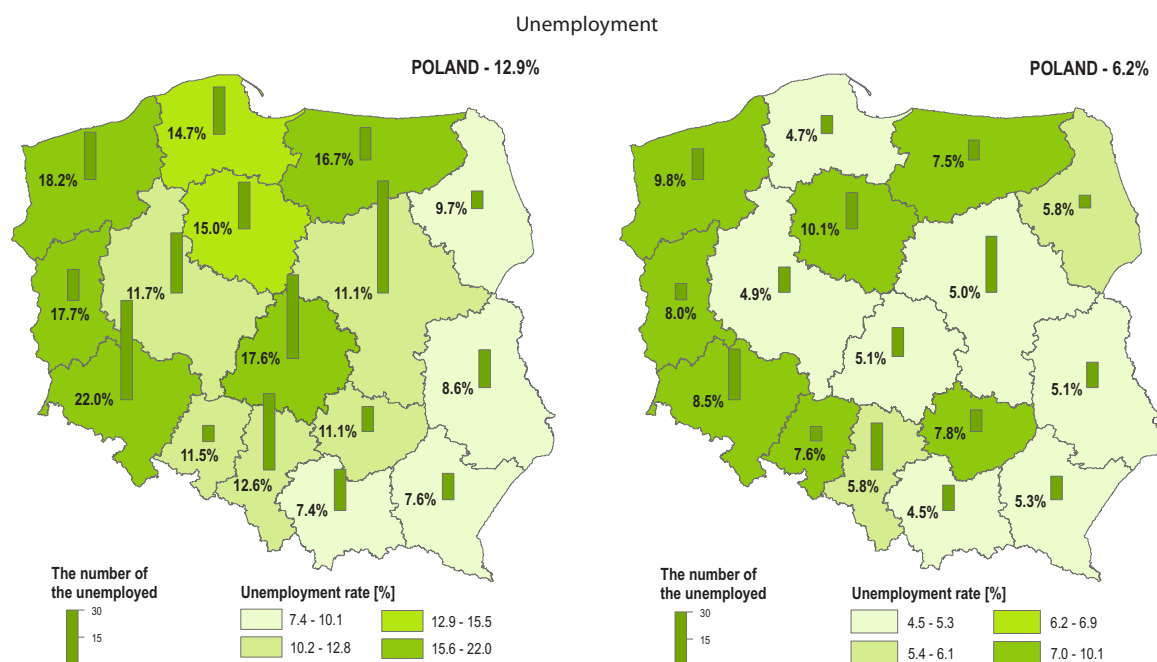


Figure I.7. Activity, employment and unemployment rates of people aged 50 and more according to voivodeships in 2004 and 2009 (average annual data)

Source: The authors' own study based on quarterly data of CSO Local Data Bank.

Activity rate as well as employment rate concerning people aged 50+ are the highest in the voivodeships of eastern Poland and in Mazowieckie Voivodeship; the difference between them and the regions with the lowest activity and employment (Śląskie, Łódzkie, and Zachodniopomorskie Voivodeships) reached nearly 10 pp. in 2009<sup>16</sup>. As compared to 2004, only in Małopolskie Voivodeship were both rates reduced; in other voivodeships opposite trends are observed (which are particularly distinct in Śląskie, Dolnośląskie, and Opolskie Voivodeships). Spatial distribution is different for unemployment rates of people aged 50+. The most favourable situation is in Małopolskie and Pomorskie Voivodeships. It is worth emphasizing that the direction of changes observed in Łódzkie, Dolnośląskie, and Pomorskie Voivodeships is positive; unemployment rates concerning people aged 50+ were reduced in the reference period there by even 10–13 pp.

## 1.4. Conclusions and recommendations

### Situation of people aged 50+/45+ in Poland

1. Demographic changes in progress which result in increasing demographic burden, in particular the burden of people at post-working age, are not distinct yet. However, during the next 25 years, these unfavourable trends will become more intensive. This requires the initiation of many undertakings now, ones facilitating more intensive economic activity of men and women, aiming at the change of social climate surrounding this issue, and legislative ones. Such ac-

<sup>16</sup> As was emphasized before, in the voivodeships of eastern Poland agricultural sector is very important; more or less, every third resident of those voivodeships is employed in this sector (as compared to the Polish average of app. 16%). This fact combined with a high rate of hidden unemployment deteriorates the assessment of economic activity of people aged 50+ in these voivodeships. In addition, in the employment structure in these voivodeships, there is a high share of health care, social welfare, education, and administration, i.e. sectors which require at least secondary education. Taking the general poor education level of the unemployed aged 50+ into account, this means significant difficulties in finding a job after losing one.

tions, of which the most important one is the realisation of the programme “Solidarity across generations. Measures aiming at increasing the economic activity of people over 50”, have already been initiated.

2. Statistical analysis conducted based on data from the monitoring indicates that economic activity of people aged 50+ is low as compared to economic activity of people aged 45–49, which is intensive. Poland is facing the problem of early professional deactivation. Among the employed, more or less every third person is at immobile age and; more frequently, these are men. In the event of women as well as men, employment rate is reduced as the immobile age increases and it is dropping fast in pre-retirement age brackets adequately to sex.
3. Admittedly, in 2004–2009, the number of the unemployed aged 50+ was reduced; however, this is mainly the result of general positive trends observed in the labour market related to the condition of Polish economy. More and more unfavourable situation of people at this age is indicated by the increasing share of the unemployed aged 50+ in the total number of the unemployed, what is particularly distinct in the voivodeships of eastern Poland.
4. The problem of people at immobile age is, most of all, the nature of their unemployment, the fact that it is long-term in particular; in consequence, this group of the unemployed is at risk of social exclusion. This is reflected with the classification of this group to people whose situation in the labour market is special. In the event of people who belong to this category (in particular those who are already excluded socially), the cooperation between local labour market institutions and social welfare units seems very important, in particular between poviats employment offices and social welfare centres. Principles of this cooperation were regulated in the amendment of the Act on Promotion of Employment of December 19, 2008 (*Dziennik Ustaw* of 2008, No. 6, item 33 — this issue is discussed wider in chapter 2 of this publication) and they concern economic activation of social welfare customers. However, that is not the end of cooperation between PEOs and ISASIs. Initiated activities include cooperation on developing strategic documents concerning labour market policy and social policy, exchanging information on activities taken towards participants of ISASI and PEO system projects, promoting good practice, and exchanging experience during conferences and other meetings dedicated to these issues.

**It is recommended** that ESF funds (Priority VII of HC OP in particular) be used more for financing PEO and ISASI partnership projects aiming at activation of people aged 50+ using social welfare.

5. Situation of people aged 50+/45+ in the labour market is different in various regions and changes in time. It is particularly unfavourable in the voivodeships of central Poland and in Silesia. The analysis of changes in both characteristics in time indicated that relatively most dynamic changes took place in **Zachodniopomorskie, Pomorskie, and Wielkopolskie Voivodeships** as well as in central Poland. This may be a result of more efficient activities aiming at activation of people aged 50+/45+<sup>17</sup> in these regions.

**It is recommended** that solutions developed in some voivodeships with the best results addressed to people aged 50+/45+ be promoted. The plan for exchanging experience will include information and promotion conferences scheduled as a part of the project *Equalising opportunities on the labour market for people aged 50+* as well as the developed thematic website, where, among other things, good practice will be presented.

6. An unemployed person aged 50/45 and more is usually poorly (insufficiently) educated. The problem includes a low level of education obtained in the basic schooling cycle and unwillingness of the unemployed to educate themselves further in the adult life. As is indicated by the considerations in the next chapter, legislative solutions introduced recently provide for preferences of improving qualifications of people from this age brackets.

<sup>17</sup> As is indicated by MLSP data (*Efektywność programów...*, 2010, pp. 4, 10), in 2009 this ration reached 42.8% for the group aged 50+/45+ for the Labour Fund from the Minister’s reserve as compare to the average 55.8% for various activities. Comparing employment effectiveness for individual voivodeships (for all the unemployed rather than only those aged 50+/45+), Wielkopolskie Voivodeship is really in the lead (67.1%) followed by Łódzkie, Kujawsko-pomorskie, Pomorskie, and Zachodniopomorskie Voivodeships.

**It is recommended** that education of adults be supported more, the unemployed as well as the employed. What is particularly important is information and promotion activity which would facilitate the process of overcoming the reluctance of people at immobile age to educate themselves (in a formal as well as informal system). The project *Equalising opportunities on the labour market for people aged 50+* aims at satisfying these needs. Wide-spread promotion activities should contribute to changes in attitudes of this part of society towards their own education.

### Monitoring of the situation of people aged 50+/45+

7. In the context of creating the policy facilitating economic activity of people at the end of their professional life, it is worth considering what scope of data concerning people from this age bracket should be collected and processed (on account of these people's professional position). This issue is of great significance, mainly on the regional and local levels. At the stage of developing strategies and action plans for employment, public employment services should flexibly adapt their proposals addressed to people at immobile age, according to real needs of local markets. It seems important to monitor surplus professions for the age bracket of 50+ or 45+; however, it is not possible to register such data because of provisions on prohibition of discrimination (i.a. discrimination based on age). However, analyses could be extended to other characteristics of the unemployed (e.g. their qualifications). It should be emphasized that works are already in progress in this area; the extended scope of data collected in the Syriusz system, which is now being implemented, will satisfy information needs of public employment services in this area. It would be a good solution to include other characteristics of the unemployed aged 50+ into PES reports, e.g. information on professional qualifications of the unemployed in accordance with the qualification level typology of the structural classification of professions and specialities (Regulation of the Minister of Labour and Social Policy of April 27, 2010 on Professions and Specializations Classification for the Needs of the Labour Market and Its Application Range, *Dziennik Ustaw* of 2010, No. 82, item 537). However, it seems that plans of such great changes in report forms combined with the process of developing data warehouse on the labour market should be verified with experience obtained during the functioning of the Syriusz system.
8. Organisations from the third sector and other private entities will be able to schedule activities addressed to people aged 50+/45+ more adequately to real needs if they will have information enabling them to diagnose the issue correctly. In order to enable them to do so, they should be equipped with reliable and sufficiently detailed data resources on widely understood potential of people aged 50+/45+ and the needs of the labour market.

That being so, it is recommended that the scope of data from the monitoring of the situation of people aged 50+/45+ in the labour market, concerning their fundamental demographic and social characteristics (e.g. sex, uniform age brackets, education level, period of unemployment, and participation in active forms of preventing unemployment) be standardized. This proposal should be implemented as early as on the level on poviats employment offices, with respect to available statistic data as well as reports on the situation in the labour market (periodical and thematic). It is also recommended that demographic and social characteristics related to the qualification of the unemployed (education level in particular) be included in publications containing data on the realisation of active policy of the labour market.





# Chapter 2

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## Legal forms of equalisation of opportunities in the Polish labour market for people aged 50+/45+

Introduction

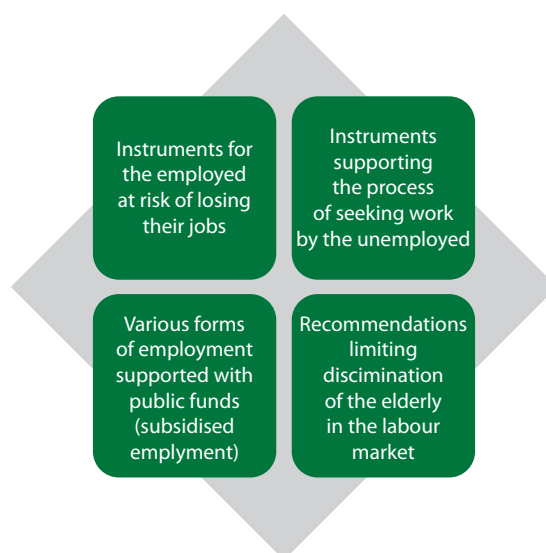
- 2.1. Legal instruments addressed to employees aged  
50+/45+ at risk of losing their jobs
- 2.2. Help with seeking work (employment)
- 2.3. Subsidised employment
- 2.4. Counteracting discrimination against the elderly in  
the labour market and Polish law
- 2.5. Conclusions and recommendations



## Introduction

Legal regulations improving, directly or indirectly, opportunities of women and men aged 50+/45+ for remaining employed or finding employment are particularly important for people from this group. These regulations are addressed to employees deciding about employing people from this category as well as to public and private institutions dealing with the labour market and the interested people themselves. The most important regulations include legal institutions for protecting special categories of employees, which, undoubtedly, include people at immobile age, including those beginning the final part of their professional lives (Miś 2007, pp. 37, 80), which starts at 50 years of age<sup>18</sup>. Pursuant to art. 49 item 3 of the Act on Promotion of Employment, such people are counted among **people whose situation on the labour market is special** and for whom special labour market services and instruments were provided for in art. 50–61a of the Act. Earlier age determined by the boundary of 45 years is also treated as a circumstance which justifies granting special rights in the labour market; these provisions have been in force since February 1, 2009 (art. 43 of the Act on Promotion of Employment in the version after the amendment of December 19, 2008, *Dziennik Ustaw* of 2009, No. 6, item 33).

Legal instruments with the discussed objectives were divided into four categories (refer to Diagram I.1); the last one is an extension to the basic catalogue of instruments related to supporting economic activity of people aged 50+/45+.



**Diagram I.1.** Categories of legal instruments related to equalising opportunities in the Polish labour market for people aged 50+/45+

Source: The authors' own study.

Information contained in this chapter can be used in practical activities of employment offices in at least two situations. Firstly, in the work of employment agents or career counsels during the development of a support programme for a specific person; secondly, while informing an unemployed person on his/her rights according to art. 36 sec. 1 item 7 of the Act on Promotion of Employment and by employees making individual employment decisions.

<sup>18</sup> An unemployed person over 50 is understood as *an unemployed person who is at least 50 on the day when labour market services or instruments are used towards him/her* (art. 2 sec. 1 item 4 of the Act of April 20, 2004 on Promotion of Employment and Labour Market Institutions, uniform text *Dziennik Ustaw* of 2008, No. 69, item 415 as amended; hereinafter referred to as "Act on Promotion of Employment"). This category was introduced to Polish regulations with the Act on Promotion of Employment.

In the fragment below, the legal situation in force in May 2011 is presented. Although this publication concerns the period of 2004–2009, it has been decided that essential updates should be introduced in order to enable readers to refer the contents of this part of the Report to reality of 2011.

## 2.1. Legal instruments addressed to employees aged 50+/45+ at risk of losing their jobs

Two groups of legal instruments addressed to people aged 50+/45+ at risk of losing their jobs may be distinguished. The first one concerns the situation when an employer has already made a decision about redundancies; the second is related to events when an employer has not made such a decision yet and the legal regulations are supposed to increase the chances of employees over 45/50 to remain employed.

### A. Legal protection for employees aged 50+/45+ during redundancies

#### Monitored dismissals

The legal basis for using this type of dismissal is art. 70 of the Act on Promotion of Employment. The definition of a monitored dismissal is specified in art. 2 sec. 1 item 44 thereof and, according to it, this is a *termination of an employment relationship or professional relationship for reasons attributable to an employment institution in relation to which labour market services are provided for employees during the notice period and for employees facing the termination of employment.*

A monitored dismissal is an instrument directed mainly to employees during the notice period, those whom an employer intends to hand notice, and, as is indicated by art. 70 sec. 2 of the Act on Promotion of Employment, to people whose employment relationship or professional relationship was terminated during the preceding 6 months. Monitored dismissals do not protect only elderly employees.

Employers who intend to dismiss at least 50 workers during 3 months are obliged to agree upon the scope and form of support for the dismissed workers with the poviats Employment Office appropriate for the registered office of the company or place of work. **This support should be provided in the form of a programme and should include employment office services, career counseling, trainings, and help in seeking work actively.** The catalogue of support forms is not closed; support may include other forms which were not listed by the legislator, ones which take specific factors into account, e.g. the nature of a local labour market or of a work position.

**The programme may be conducted by the following:** poviats employment office, employment agency, or education institution. The programme is **financed** mainly by an employer. Its realisation may also be co-financed by appropriate civil service units, organisations, and legal persons.

An important entitlement related to monitored dismissals is **a training benefit which may be granted** by an employer at an employee's request. This benefit may be granted after the employment relationship or professional relationship has been terminated, for the period during which an employee participates in trainings; however, no longer than 6 months. It is financed from the employer's training fund specified in art. 67 of the Act on Promotion of Employment. A basis for paying this benefit is formed by an agreement entered into by an employer and an employee; its amount is determined based upon principles concerning annual leave remuneration. However, it may not exceed two times minimum remuneration for work. An employer who granted training benefits financed with its own funds has the right to have retirement and dis-

ability pension premiums refunded. A person who receives a training benefit has the right to receive support provided by an Employment Office concerning career counseling or may be sent, by a poviata Employment Office, to a one-time training organised and financed based upon principles specified in the Act on Promotion of Employment (art. 40–41 in particular).

A part of people from this age bracket enjoys special protection against termination of their employment contracts. Pursuant to art. 39 of the Labour Code, employees who need no more than 4 years to reach their retirement age enjoy protection against termination of their employment relationships if the period of employment enables them to acquire retirement rights after they have reached that age; the termination of an employment relationship should be understood here as a notice changing employment or remuneration conditions as well as a definite termination. They are entitled to weaker protection in the event of a group dismissal; an employer may hand in a notice changing employment or remuneration conditions. If the notice concerning employment or remuneration conditions results in the reduction of remuneration, an employee is entitled to a compensation benefit until the end of the protection period.

This regulation is important from the standpoint of providing social protection to the reference category of people within the period before the acquisition of retirement benefits and from the standpoint of relieving public funds. Employers giving work to such people, who were unemployed up to that moment, must take the necessity of respecting protection periods into account. This factor often influences employers' recruitment decisions and results in the fact that contracts for specified periods of time are used more frequently as a basis for employment.

#### **Protection related to receiving benefits provided for in the anti-crisis act (these solutions were implemented in the second half of 2009)**

Another instrument for protection against losing one's job is the one related to receiving benefits provided for the anti-crisis act, i.e. Act of July 1, 2009 on Mitigation of Economic Crisis Effects for Employees and Entrepreneurs (*Dziennik Ustaw* of 2009, No. 125, item 1035 as amended). Solutions provided for therein are not specifically for employees over 50 but may be used for their protection. Pursuant to art. 6, entrepreneurs with transitional financial difficulties may not terminate contracts of employment for reasons not being attributable to employees during the period of receiving benefits specified in art. 14 (monies from the Labour Fund for a part of remuneration, for a partial compensation of work time reduction, and for premiums to social insurance for employed workers); this regulation also applies to the period of repayment by employees of loans granted from employers' Funds and in the periods of grants paid to employees during trainings or post-graduate courses. Protection against dismissals is also in force in periods following the period of receiving benefits/grants directly; however, no longer than for 6 months. The quoted art. 6 of the anti-crisis act precludes the application of art. 5 sec. 5 and art. 10 of the Act on Group Dismissals; as a result, employers may not give notice concerning employment and remuneration conditions to employees at pre-retirement age receiving benefits specified in art. 14 of the anti-crisis act. However, this protection is temporary; it may only be enjoyed until the end of the period in which the anti-crisis act is in force, i.e. until December 31, 2011.

**Special programmes for people over 45** (art. 49a of the Act on Promotion of Employment<sup>19</sup> — the provisions entered into force on February 1, 2009 (*Dziennik Ustaw* of 2009, No. 6, item 33)

<sup>19</sup> This entitlement was introduced with the Act of December 19, 2008 amending the Act on Promotion of Employment and Labour Market Institutions and other acts (*Dziennik Ustaw* of 2009 No. 6, item 33).

This regulation states (art. 66a read in connection with art. 49a and art. 43 sec. 3) that people at the specified age<sup>20</sup> who are registered as seeking employment and are during the period of notice for reasons attributable to their employment institutions; who are employed by an employer concerning which the declaration of bankruptcy was made or which is in liquidation; or who receive training benefits from their employers after the termination of their employment relationships, may participate in special programmes. Special programmes are regulated in chapter 13a of the Act on Promotion of Employment (art. 66a–66b). Pursuant to art. 2 sec. 1 item 27 of the Act, special programmes include a set of activities aiming at the adaptation of one's professional qualifications or obtaining new qualifications and learning new skills as well as at the support of work places which are at risk or which already exist or are being created. The purpose of special programmes, pursuant to art. 66a sec. 1, includes economic activation of participating people, including employees over 45. That being so, special programmes may result in economic activation of the specified group of employees, particularly by adapting their professional qualifications or enabling them to obtain new qualifications and learn new skills as well as by supporting work places which are at risk or those which still exist.

## B. Improving chances of remaining employed of employees aged 50+/45+

The second group of solutions aiming at improving chances of remaining employed is addressed to **employees over 45**. The purpose of these solutions is to boost the professional attractiveness of employees and, as a result, to help them with holding their employee status as long as possible.

The legislator tries to prevent unemployment of employees over 45+ or possibly shorten the period of their unemployment, creating opportunities to send people who remain employed to trainings.

This includes the following:

- the possibility of starosts to send people to trainings in order to improve their professional qualifications and other qualifications, what will improve their chances for finding work or remaining employed, and to finance such trainings (art. 43 sec. 3 of the Act on Promotion of Employment); the possibility of paying the costs of exams as a result of which people will obtain certificates, diplomas, specified professional qualifications, or professional titles, and paying costs of obtaining licences essential to perform a specific job (art. 40 of the Act); the possibility of granting, by starosts at the interested parties' requests, non-bearing interest loans for financing costs of trainings which enable the starting of a job or remaining employed or performing other gainful work (art. 42 of the Act); the possibility to pay costs of post-graduate courses (art. 42a sec. 1–4 of the Act), and
- the possibility to receive partial refund of training costs from the Labour Fund, one which would supplement the subsidisation for the training received from the training funds established by an employer; higher refunds for employees over 45. than in the event of younger employees participating in trainings (art. 69 sec. 1 of the Act on Promotion of Employment).

This category of actions also includes legislative undertakings being a part of the programme **“Solidarity across generations. Measures aiming at increasing the economic activity of people over 50”**, which also may influence decisions on leaving the labour market, particularly the following:

<sup>20</sup> The provisions of art. 66a do not apply directly to this age bracket. This has to be concluded from references made by the legislator in art. 66a, which refers to art. 49a, which, in turn, refers to art. 43, where, in sec. 3, provisions specify people after 45.

- the amendment of the Act of March 4, 1994 on the Establishment Social Benefit Fund (*Dziennik Ustaw* of 1996, No. 70, item 335 as amended), providing for financing kindergartens at employment institutions from social benefits fund (*Dziennik Ustaw* of 2008, No. 237, item 1654);
- entering into force of the Act of February 4, 2011 on the Care of Children under 3 (*Dziennik Ustaw* No. 45, item 235), which indirectly influences the development of employment in the sector of young children care, what, in turn, may result in delaying people over 45 leaving of the labour market and creating incentives for them to start work in the sector of care of children under 3;
- amendment of the Act of December 17, 1998 on Retirements and Disability Pensions from Social Insurance Fund (*Dziennik Ustaw* of 2008, No. 67, item 411); and
- entering into force of the Act of December 19, 2008 on Transition Retirements (*Dziennik Ustaw* of 2008, No. 237, item 1656), limiting the number of people entitled to early retirement on account of work in special conditions or work of special nature.

## 2.2. Help with seeking work (employment)

Support addressed to all the unemployed includes, above other things:

- employment office (art. 36 of the Act on Promotion of Employment),
- career counseling (art. 38 of the Act on Promotion of Employment),
- help with active seeking of work (art. 39 of the Act on Promotion of Employment),
- trainings for the unemployed (art. 40–42a of the Act on Promotion of Employment),
- financing costs of travelling to a future employee (art. 45 sec. 3 of the Act on Promotion of Employment)<sup>21</sup>.

As opposed to other groups of the unemployed, people over 50 enjoy the privilege of priority consisting in the fact that poviats employment offices are obliged to give them offers of employment, other gainful work, trainings, traineeships, professional preparation for adults, or employment in intervention works or public works within 6 months following the date of registration (art. 50 sec. 1 of the Act on Promotion of Employment).

## 2.3. Subsidised employment

Subsidised employment should be understood as all forms of employment the cost of which is paid, in part or as a whole, from public funds, or situations where employees are relieved from paying specified public costs related to employment.

### A. Intervention works (art. 51 and art. 59 of the Act on Promotion of Employment)

Pursuant to the definition provided in art. 2 sec. 1 item 26 of the Act on Promotion of Employment, it is *the employment of an unemployed person by an employer which was a result of an agreement entered into with a starost and aiming at supporting people whose situation in the labour market is special, specified in art. 49*. An essence of intervention works is a possibility of a starost to refund a part of costs paid by an employer for remuneration, awards, and social insurance premiums with respect to the unemployed sent to intervention works. The refund depends on the time of employment and work time. **The Act on Promotion of Employment provides for two forms of intervention works which may be used by people over 50:**

<sup>21</sup> Detailed description of support forms addressed to the unemployed may be found in the Act on Promotion of Employment. They will not be discussed here in detail because of the specific nature of this publication.

- 1) intervention works addressed to all categories of people specified in art. 49, counted among people whose situation in the labour market is special, **including people over 50 (art. 51)**. They may last for the maximum of **6 or 12 months**, depending on the way of dividing the refund;
- 2) intervention works **only for the unemployed aged over 50 (art. 59)**. They may last for **up to 24 months or up to 4 years**. In the first event (i.e. intervention works lasting for up to 24 months), the refund of costs paid by the employer for remuneration and social insurance premiums is monthly; in the second event (i.e. intervention works lasting for 48 months), costs paid every second month are only refunded. The refund depends on meeting by the unemployed conditions essential to acquire pre-retirement benefit. If an unemployed person meets these conditions, the refund is granted of up to 80% of minimum remuneration and social insurance premiums on the refunded remuneration; if these conditions are not met, the refund is only up to 50% of the aforementioned amount<sup>22</sup>.

Intervention works are, most of all, opportunities for the unemployed from the special risk group (which includes people over 50) to find employment, what would not be possible without financial support from public funds. This gives them an opportunity for permanent employment if they are recognised as good employees in their employment institutions.

Thus, intervention works are forms of employment in which employers may recruit new workers with limited costs. For employers, intervention works mean a reduction of employee costs owing to refunds from the Labour Fund.

## B. Public works (art. 57 of the Act on Promotion of Employment)

Public works are defined as *employment of an unemployed person for a period no longer than 12 months to perform works organised by communes; non-governmental organisations which, according to their statutes, deal with issues related to environmental protection, culture, education, sport, tourism, health, care, unemployment, and social welfare; water companies; or associations of water companies if these works are financed or subsidised with funds of local government, state budget, special funds, non-governmental organisations, water companies, or associations of water companies* (art. 2 sec. 1 item 32 of the Act on Promotion of Employment). This means that **the organiser of public works who employed the sent unemployed over 50**, receives a partial refund of costs paid for remunerations, awards, and social insurance premiums from a starost. The refund depends on the period of employment. In the event of employing an unemployed person for up to 6 months, the refund may not exceed 50% of the average remuneration and social insurance premium on the refunded remuneration; if the employment lasts for up to 12 months, the refund may reach the average remuneration and social insurance premium on the refunded remuneration but in such an event only the costs paid every second month are refunded;

As a form of stimulating employment, public works have two functions: a) their purpose is to perform works which are useful for the community in the areas of culture, health care etc. (cf. the definition from art. 2 sec. 1 item 32 of the Act) and which are of great significance for the development of the region; b) they influence the creation of work places financed with public funds for people who cannot find employment in the open labour market. **Therefore, it is a very useful form of employment for people from special categories of the unemployed, including the**

<sup>22</sup> Detailed principles of organising public works are specified in the Regulation of the Minister of Labour and Social Policy of January 7, 2009 on Organising Intervention Works and Public Works, and a one-time Cost Refund of Paid Social Insurance Premiums (*Dziennik Ustaw* of 2009, No. 5 item 25).



elderly. However, it should be emphasized that it is not possible to continue the employment after the work programme has been completed.

### C. Traineeship at employment institutions (art. 53 of the Act on Promotion of Employment)

Pursuant to art. 2 sec. 1 item 34 of the Act on Promotion of Employment, a traineeship at an employment institutions means *obtaining by an unemployed person of practical professional skills through performing tasks in the work place with no employment relationship with the employer*. Principles of **traineeships for the unemployed aged 50+** are as follows:

- a starost may send the unemployed over 50 to traineeships for the period which does not exceed 6 months to employment institutions, agricultural production cooperatives, or adult natural persons residing within the territory of Poland and conducting business activities concerning plant or animal production within the territory of Poland;
- during the traineeship, the unemployed are entitled to receive a grant equal to 120% of the unemployment benefit<sup>23</sup>.

### D. Professional preparation of adults (art. 53a–53m of the Act on Promotion of Employment)

Professional preparation of adults is *an activation instrument in the form of a practical job training for adults, with no employment relationship with an employer, and according to the programme including practical skills and theoretical knowledge, ending with an exam* (art. 2 sec. 1 item 29a of the Act on Promotion of Employment). Professional preparation of adults may be used by all the unemployed counted among special categories of people in the labour market pursuant to art. 49 of the Act and people seeking work (art. 43 sec. 1 item 3–7 of the Act); therefore, people aged 50+/45+ as well.

It may be organised in two forms:

- as a practical job training for adults lasting for a period from 12 to 18 months, which enables the participants to a professional title exam or a journeyman exam,
- as training adults for work for a period from 3 to 6 months with the purpose of obtaining chosen professional qualifications or skills essential to perform specified professional tasks specific for a job listed in the classification of jobs and specializations for the needs of the labour market.

During the professional preparation of adults, participants are entitled to receive grants equal to 120% of the unemployment benefit if the preparation consists of at least 150 hours a month (if it consists of less hours, the grant is calculated proportionally).

### E. Special programmes (art. 49a of the Act on Promotion of Employment)

Special programmes, which have already been mentioned before, may include various forms of subsidised employment. Pursuant to art. 49a of the Act on Promotion of Employment, the unemployed and people specified in art. 43 (therefore, people over 50 as well), selected by starosts, who take analyses and predictions concerning the local labour market into account, may additionally participate in special programmes (art. 66a of the Act on Promotion of Employment) understood as *set of activities aiming at the adaptation of one's professional qualifications or obtaining new qualifications and learning new skills as well as at the support of work places which are at*

<sup>23</sup> Detailed principles of traineeships are specified in the Regulation of the Minister of Labour and Social Policy of August 20, 2009 on Conditions of Traineeships for the Unemployed (*Dziennik Ustaw* No. 142, item 1160).

risk of liquidation or which already exist or are being created (art. 2 sec. 1 item 27b of the Act on Promotion of Employment)<sup>24</sup>.

## F. Participation in a social contract, local social welfare programme, or individual social employment programme (art. 50 sec. 2 of the Act on Promotion of Employment)

The unemployed over 50. who receive social benefits and are at risk of social exclusion may use the following special forms of support:

- in the period of 6 months following the date on which a specific person lost his/her entitlement to unemployment benefit due to the expiry of the benefit period (and in the period of 6 months following the registration in the event of the unemployed with no entitlement to unemployment benefit), poviats employment offices may, at the request of social welfare centres, refer such people to participate in a social contract (art. 108 of the Act of March 12, 2004 on Social Welfare, *Dziennik Ustaw* of 2009, No. 175, item 1362 as amended), in a local social welfare programme (art. 110 of the quoted Act on Social Welfare), or in an individual social employment programme specified in art. 12 of the Act of June 13, 2003 on Social Employment (*Dziennik Ustaw* of 2003, No. 122, item 1143);
- the essence of the listed forms of economic activation is increasing activity and every-day and professional independence or preventing social exclusion, i.e. solving problems of people in a difficult situation. This usually requires the cooperation of various institutions, which is present in this case; the legislator encouraged social welfare centres and poviats employment offices to cooperate;
- social contracts are entered into with a social worker. In the event of people whose situation in the labour market is special, contracts are entered into based on an agreement between a social welfare centre and a poviats Employment Office. The unemployed who have entered into a social contract are entitled to health insurance;
- local social welfare programmes are developed and implemented by boards of communes according to existing needs concerning social welfare;
- individual social employment programmes may be participated in based on a referral from a poviats Employment Office with the opinion from a social welfare centre. The unemployed are sent to centres for social integration (CSI) created based on provisions of the Act on Social Employment and they are accepted, having signed individual social employment programmes. Such programmes are prepared by CSI social workers and should specify, above all things, the scope and forms of professional and social re-integration, types of psychic and physical skills necessary to start work, methods for exercising these skills, and people responsible for the realisation of a programme. Referred people are entitled to health insurance on condition that they carry out their programmes. During the programme, managers of centres of social integration, at participants' requests, grant an integration benefit equal to unemployment benefit, which is then refunded from the Labour Fund by the starost appropriate for the registered office of the centre; the refund includes the amount paid in the preceding month for integration benefits and social insurance premiums. The maximum period of participation in a programme is 18 months.

<sup>24</sup> Detailed principles concerning the organisation and realisation of these programmes are specified in the Regulation of the Minister of Labour and Social Policy of March 23, 2009 on Special Programmes (*Dziennik Ustaw* of 2009, No. 50, item 401) adopted based on art. 66b of the Act on Promotion of Employment.

## G. Other labour market services and instruments

Other labour market services and instruments which consist in financial support of employment in various forms<sup>25</sup> are available based on the same principles for all the unemployed. These are particularly the following:

- **subsidization of work place equipment** (art. 46 sec. 1 item 1 of the Act on Promotion of Employment),
- **granting funds for starting business activity** (art. 46 sec. 1 item 2 of the Act on Promotion of Employment),
- **refunding costs of travelling to an employer and accommodation in another city, paid in relation to finding employment** (art. 45 of the Act on Promotion of Employment),
- **activation benefits** (art. 48 of the Act on Promotion of Employment),
- **refunding costs of social insurance premiums paid in relation to employing of a referred unemployed person** (art. 47 of the Act on Promotion of Employment).

## H. Temporary and permanent exemption of employers from contributions to the Labour Fund and the Guaranteed Employee Benefits Fund; tax reliefs

**Financial incentives for employers**, which are supposed to result in the increase in employment rate of people over 50, form a significant group of legal solutions from the standpoint of economic activation of people from the analysed group. They include, above other things, **preferential principles of paying sick leave benefits<sup>26</sup>, exemptions from contributions to the Labour Fund and the Guaranteed Employee Benefits Fund, and tax reliefs.**

These regulations directly influence the situation of employees over 50, relieving employers of economic burden related to potentially more frequent sick leaves than in the event of younger employees.

**This offer is expected to reduce work costs paid by employers related to the employment of people aged 50+:**

(1) **remuneration during sick leave** (art. 92 of the Labour Code). **For a period in which an employee over 50 is unable to work** as a result of a disease or isolation as a consequence of an infectious disease lasting for the total of 14 days in a calendar year, the employee has the right to receive 80% of remuneration unless labour regulations in force at the employer's provide for higher remuneration on this account. If inability to work is a consequence of an accident while commuting to work or from work and it lasts for the total of 14 days during a calendar year, employees over 50 have the right to receive 100% of remuneration.

For a period of inability to work, for reasons specified above, which exceeds 14 days in a calendar year, **employees over 50** have the right to receive sick leave benefit pursuant to the Act of June 25, 1999 on Financial Benefits from Social Welfare in Case of Illness and Motherhood (uniform text: *Dziennik Ustaw* of 2010, No. 77, item 512 as amended). In art. 92 § 5 of the Labour Code, the legislator specifies that the provisions of the part concerning employees aged 50 pertain to their inability to work in a calendar year in which they reached 50 years of age.

<sup>25</sup> Monies received by employers from public funds result in the reduction of work costs paid by employers; if an employer pays an employee's costs of commuting to work, these amounts increase the employee's income and taxable basis.

<sup>26</sup> Sick leave benefit is paid by SSI in principle but in specified situations this obligation may be transferred to an employer. This benefit is paid after the 14th day of the period of inability to work; until the 14th day, it is a remuneration during sick leave.

(2) the Act on Promotion of Employment provides for **temporary and permanent exemptions from contributions to the Labour Fund** related to the employment of people over 50. At the same time, the Act of July 13, 2006 on Employees Claims Protection in the Case of Employer's Insolvency (*Dziennik Ustaw* of 2006, No. 158, item 1121 as amended) provides for **two types of exemptions from contributions to the Guaranteed Employees Benefits Fund for employers** related to the employment of people over 50:

- the first exemption is temporary and has been constructed analogically in the event of contributions to the Labour Fund and contributions to the Guaranteed Employees Benefits Fund. Pursuant to art. 104b sec. 1 of the Act on Promotion of Employment and to art. 9b sec. 1 of the Act on Employees Claims Protection, an employer does not pay contributions to LF/GEBF for 12 months, starting from the first month following the month in which the contract of employment was entered into, for people over 50 who remained for 30 days in the unemployed register of a poviast Employment Office before the employment;
- the second exemption is permanent and is provided for in art. 104b sec. 2 of the Act on Promotion of Employment and art. 9b sec. 2 of the Act on Employees Claims Protection. Pursuant to these provisions, an employer does not pay contributions to LF/GEBF for employees who are at least 55 (women) or 60 (men).

The temporary exemption concerns only people who were registered as unemployed before the employment. Therefore, **the legislator encourages economic activation of people over 50 in particular**. However, it should be emphasized that pursuant to the provisions of art. 104b sec. 1 of the Act on Promotion of Employment and art. 9b sec. 1 on Employees Claims Protection, employers have the right to the temporary exemption only in the event of entering into contracts of employment. In the event of the permanent exemption, the form of employment does not influence the right of employers to use the exemption so it does not have to be a contract of employment.

These exemptions are obligatory and should result in notable financial benefits for employers in relation to **employing people over 50**. In 2010, a contribution to GEBF was 0.1% of the basis for contributions to retirement and disability pension insurance; a contribution to the Labour Fund was 2.45% of this basis.

(3) **tax reliefs being public support for employing people whose situation is particularly unfavourable** (therefore, those aged 50+ as well) are provided for in the Regulation of the Council of Ministers of October 15, 2009 on Granting Certain Reliefs in Tax Liabilities Constituting Public Support for Employing Persons in Exceptionally Unfavourable Situation and Disabled Persons (*Dziennik Ustaw* of 2009, No. 183, item 1426). This entitlement includes possibilities of reliefs in paying taxes consisting in postponing tax payment deadlines, paying taxes in instalments, postponing the payment deadline of tax arrears with interest or paying them in instalments, postponing the payment deadline of interest on tax arrears or paying them in instalments, or remitting the whole or a part of tax arrears, interest on tax arrears, or extension fee. These reliefs are public support for employing people whose situation is particularly unfavourable and disabled people, to which the provisions of the Commission Regulation EC No. 800/2008 of August 6, 2008<sup>27</sup> apply.

(4) **exemption from personal income tax**. They are specified in the Act of July 26, 1991 on Personal Income Tax (uniform text: *Dziennik Ustaw* of 2010, No. 51, item 307). Pursuant to the Act:

- benefits granted by employers, pursuant to separate regulations, for improving professional qualifications are tax-free, except for remuneration received for being excused from a part of or a whole day of work or for training leave (art. 21 sec. 1 item 90 of the Act on Personal Income Tax); this solution may be applied to all employees;
- tax-free amounts also include the refund of costs received by the unemployed, including those over 50, based on the Act on Promotion of Employment, i.e. costs paid for travelling to the place of work, medical/psychological examination, traineeship, training, professional preparation of adults, career counseling, classes supporting active seeking of work, or community

<sup>27</sup> If the employer has limited financial resources which may be used to repay their debts, the deferment of payment, e.g. tax liabilities constitutes considerable direct help which, in turn, influences the labour market situation; the employer will not be forced, for example, to limit the employment volume or such limitations may be postponed.

works, as well as accommodation in the place of work, traineeship, training, or professional preparation of adults (art. 21 sec. 1 item 102 of the Act on Personal Income Tax). **The fact that tax-free amounts include refunded costs paid in relation to traineeships concerns directly people over 50; other amounts concern all categories of the unemployed;**

- tax-free amounts also include non-repayable benefits or partly repayable benefits as well as non-pecuniary benefits on account of post-graduate courses, trainings, professional preparation of adults, exams, licences, medical or psychological examinations, and accident insurance, received pursuant to the Act on Promotion of Employment (art. 21 sec. 1 item 118 of the Act on Personal Income Tax);
- one-time benefits granted to the unemployed for taking up activities specified in art. 46 sec. 1 item 2 of the Act on Promotion of Employment are also tax-free (art. 21 sec. 1 item 121 of the Act on Personal Income Tax).

## 2.4. Counteracting discrimination against the elderly in the labour market and Polish law

Regulations in the area of non-discrimination of the elderly are included in the Labour Code, the Employment Promotion Act and the Act of 3 December 2010 on implementation of some provisions of the European Union on equal treatment (*Dziennik Ustaw* of 2010 No. 254, item 1700; hereinafter: the Equality Act; the regulation entered into force on 1 January 2011). At the beginning of this analysis it needs to be underlined that **not every difference of the legal situation of a given person is discriminatory in character; a difference which is objectively justified cannot be regarded as discriminatory.**

The principle of equal treatment with regard to people over 50 means that whether employed or not these people have the same rights and obligations as people who are not in the same situation. The principle of non-discrimination, on the other hand, means that people over 50 can be treated unequally with regard to employment or access to the services or instruments of the labour market under the condition that this treatment is grounded in a justified premise which explains the differentiation.

In summary, the acceptable differences constitute **differentiation** (objective, justified criteria), and the unacceptable differences constitute discrimination (unjustified criterion).

Each of the legislative acts indicated above provides protection for different categories of entities; as a result, the group of addressees of the discrimination ban is also different. Depending on the legislative acts, the legislator constructed different **catalogues of discrimination ban criteria**. In the Labour Code, this catalogue is an open one, providing only examples of unacceptable differentiation criteria; the Equality Act and the Employment Promotion Act, on the other hand, contain closed lists. Irrespective of the above, **the common criterion for all the indicated legislative acts is the age criterion.**

The most important addressees of the ban against discrimination, which is our focus in this report, are **employers**. The ban is formulated in the provisions of the Labour Code, in particular Articles 11<sup>3</sup> and 18<sup>3a</sup>. The protection covers natural persons applying for a job and employees in the phase of realisation and termination of an employment relationship. **The regulation does not directly refer to the situation of people over 50, but in practice it is applied by employees in the process of pursuing their rights before courts. This demonstrates the increasing awareness of employees in the pre-retirement age** about not being a lesser category of

candidates for employment on the labour market and deserving appropriate treatment from employees. On the other hand, it can be noted that the above regulation fulfils its social function as in reality employers frequently discriminate against people over 50 with regard to access to employment, and in particular use the age criterion when taking dismissal decisions. The guarantees of complying with the non-discrimination principle in employment relationships are included in Article 18<sup>3d</sup> and Article 18<sup>3e</sup> of the Labour Code. A person with regard to whom an employer infringed the principle of equal treatment in employment has the right to compensation in an amount not lower than the minimum wage established on the basis of separate provisions. Pursuing by an employee of their rights resulting from an infringement of the principle of equal treatment in employment cannot be a basis for disadvantageous treatment of this employee and cannot cause any negative consequences to this employee, and in particular cannot constitute grounds for termination by the employer of the employment relationship or its dissolution without notice.

Another addressee of the discrimination ban are **institutions of the labour market** as defined in the Employment Promotion Act. Pursuant to Article 2a of this Act, in force since 1 January 2011, the provisions of the act are to *ensure compliance with the principle of equal treatment in the access to and use of the services of the labour market and the instruments of the labour market regardless of sex, race, ethnic origin, nationality, religion, religious beliefs, convictions, disability, age or sexual orientation*. The entities which are most susceptible to non-compliance with the obligations resulting from the principle of equal treatment are the poviats employment offices and voivodeship employment offices when offering services of the labour market, i.e. acting as an employment office. Pursuant to Article 36, paragraph 4 of the Employment Promotion Act, employment office services for the unemployed and seeking employment is conducted in compliance with the equality principle, which means that there is an obligation to offer assistance to all the unemployed and seeking employment or another kind of paid engagement irrespective of sex, **age**, disability, race, religion and other criteria specifically indicated in this provision. Looking at the issue from a different perspective, the principle is to be understood as an obligation to refrain from discriminatory behaviour on the basis of the criteria indicated in the provision. Pursuant to Article 36, paragraph 5e of the Employment Promotion Act, on the other hand, a poviats employment offices cannot accept a job offer if its requirements infringe the principle of equal treatment in employment within the meaning of the provisions of the labour law and the employer is likely to discriminate against candidates on the basis of the criteria indicated above, in particular on the basis of age. What is more, pursuant to Article 123 of the Employment Promotion Act, if an employer refuses to employ a person at a vacant position or a vocational preparation position on the basis of age they are subject to a fine in an amount not lower than PLN 3000. **This provision can therefore offer protection against discrimination by employers refusing to employ a candidate on the grounds of his/her being over 50 without an objective justification.**

The Employment Promotion Act, in Article 19c, clearly assigns the obligation under consideration also to **private employment agencies**, which should avoid discriminatory behaviours, e.g. on the grounds of age, against a person for whom they are seeking employment or another kind of paid engagement. Non-compliance with this obligation is an infringement of the provisions of the act and can lead to a fine in an amount not lower than PLN 3000 (Article 121, paragraph 3).

Analogous regulations recognising the risk of discrimination are contained in other provisions of the Employment Promotion Act: Article 10, paragraph 5 with regard to work permits issued to foreigners; Article 38, paragraph 2, point 3 with regard to job counseling services and job information services; Article 40, paragraph 6 with regard to training.

One of the recent regulations in the area of non-discrimination, i.e. the **Equality Act**, deserves a separate treatment. It does not go against the anti-discrimination regulation with regard to employees as it applies to employees in a scope not regulated by the Labour Code (Article 2, paragraph 2 of the Act). More importantly, the obligation to apply the provisions of the act lies with the public employment services and other entities acting for the benefit of employment, development of human resources and counteracting unemployment (Article 4, point 4, subpoint a of

the Equality Act). Pursuant to Article 8, paragraph 1, point 4 of the Act, it is forbidden to treat unequally natural persons, in particular on the grounds of age, with regard to the access to and conditions of using the instruments of the labour market and the services of the labour market specified in the Employment Promotion Act and offered by institutions of the labour market and other entities acting for the benefit of employment, development of human resources and countering unemployment. Hence, the Act complements the regulation of the Employment Promotion Act. In the light of the Equality Act, all instruments and services of the labour market must be used considering the non-discrimination principle, in particular, in the case under consideration, with regard to age. Therefore, the unemployed and seeking employment who are over 50 must have an equal access to the services and instruments of the labour market. Any differences in the situation of the beneficiaries of such benefits arising in connection with age must result from objective premises and be rationally justified with a lawful aim, e.g. purposes of vocational training (Article 5, point 8 of the Equality Act) or use of means which are necessary in a democratic state for ensuring public safety and order or for protecting health, freedom or rights of other people (Article 8, paragraph 2 of the Act). Each person with regard to whom the principle of equal treatment is infringed has the right to compensation according to the rules set out in the Civil Code (Article 13 of the Equality Act). The obligation to prove plausibility of an infringement of this principle lies with the person claiming the infringement (Article 14, paragraph 2 of the Equality Act).

## 2.5. Conclusions and recommendations

1. In accordance with the purpose of the present analysis of the legal framework of support for people aged 50+/45+ it should be noted that the legislator acknowledges as a special category of people on the labour market only people over 50. The changes introduced recently to the provisions of the Employment Promotion Act demonstrate that the legislator accepts, but only in a limited scope, application of some special forms of economic activation to people aged over 45.
2. The diversity of the available instruments of the labour market referring to this category of people makes it possible for employment bodies to have flexible policies in the area of allocation of financial resources taking into consideration above all the needs of special categories of the unemployed. However, taking appropriate decision in this area, especially considering modest means available for the purposes under discussion, is not facilitated by the fact that people belonging to special categories of the unemployed — and therefore eligible for obtaining most benefits — constituted in January 2011 90.8% of all the unemployed.
3. There are many legal institutions which can be used for the benefit of the elderly; the effectiveness of measures will increase if they are well selected for individual cases and form a sector of services and instruments adapted to the situation and needs of a given beneficiary (unemployed, seeking employment). When applying the services and instruments described above it is also necessary for different entities involved in assisting the unemployed (e.g. the Employment Office, welfare centre) to cooperate in order to avoid numerous use of the same forms of support for the same person.
4. A systematic and comprehensive juxtaposition of the services and instruments of the labour market related to people over 45/50 will make it possible to precisely determine the role which should be performed by each of them in situations when they are used in parallel, i.e. with regard to the same person.
5. Intervention work is a form of economic activation of the unemployed which is always time-limited. In the case of the elderly special forms should be preferred, characterised by longer duration and allowing attainment of the age giving rights to retirement benefits.

6. Public works are recommended in cases of people who have little chance of finding employment in the open labour market (e.g. in danger of social exclusion). With regard to older people, this form can be particularly useful in cases of people who for social reasons should have the possibility of reaching the age giving retirement rights, especially in the disappearing professions and sectors of the economy.
7. Vocational training of adults is a less attractive tool of economic activation targeted at the unemployed aged 50+. Employers have at their disposal a tool similar to vocational training of adults and far less complex, i.e. traineeships, and they prefer to use this possibility. In general, vocational training of adults and traineeships are forms useful for people from younger age groups (45–55 years) when there is a probability of using the acquired new professional qualifications over a reasonable period (e.g. 10 years). It is crucial, however, to prepare for this category of people separate organisational forms taking into consideration their capabilities and needs and based on different, preferential financing rules. When choosing from among the specified forms of activation one can also take into account financing and taxation rules as some of these forms are eligible for income tax exemptions (funding from the ESF). Moreover, the present rules of financing traineeships from two sources: the Labour Fund and the ESF funds result in the net amount of a grant received by trainees performing the same work, even with the same employer, but financed from different sources being different (with discrepancies of approximately 20%). Such differences, being demotivating, should be eliminated.
8. Protection of employment relationships of employees in the pre-retirement age is of particular importance for keeping employees over 50 in the labour market. Employment of such people has a positive impact on economy and public finance. On the one hand, such people contribute to increasing the gross domestic product and on the other do not constitute a burden for public funds in relation to financing their pensions. It should be remembered that employers taking on people over 50, until recently unemployed, must take into consideration the observation of protection periods. This is a factor which will often influence the decisions taken by employers in the recruitment process or more frequent use of temporary agreements as a basis for employment. The practice of employment bodies should take these conditions into consideration and appropriately use in the process of activation of the elderly the possibilities related to the application of subsidised forms of employment in order to compensate employers for the risk of such employment and increase its benefits. In particular, proportions of people directed to employers within the framework of subsidised forms of employment can be used, providing for a defined participation of the unemployed from the 50+ group among the newly-employed.
9. Tax regulations — this solution is to be assessed positively due to a strong psychological and social impact on decisions of entrepreneurs. This is now one of the least common instruments designed to encourage employers to employ people aged over 50. In the present situation, it may be recommendable for local authorities to consider the possibility of using this type of legal solutions taking into consideration the possibility of their impact on shaping local taxes.



# Part II

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Programmes targeted at people aged 50+/45+  
implemented in Poland between  
2004 and 2009



## Introductory Remarks

So far, our remarks introduced the reader into the subject matter which is central to the second and most important part of this report. The obtained knowledge about the situation of people aged 50+ (or more broadly: 45+) in the labour market, including its regional differentiation, will facilitate evaluation of the measures undertaken in Poland in this area. The presented legal framework for equalisation of opportunities for people aged 50+ in the labour market in Poland make it possible to put the analysis in the context of legislative conditions of the measures programmed after 2004.

The second part of the report covers two fundamental issues: (1) measures programmed by the state government and local governments related to the broadly understood economic activity of people aged 50+/45+ and (2) concrete initiatives undertaken by different public and private institutions co-financed from domestic and foreign funds.

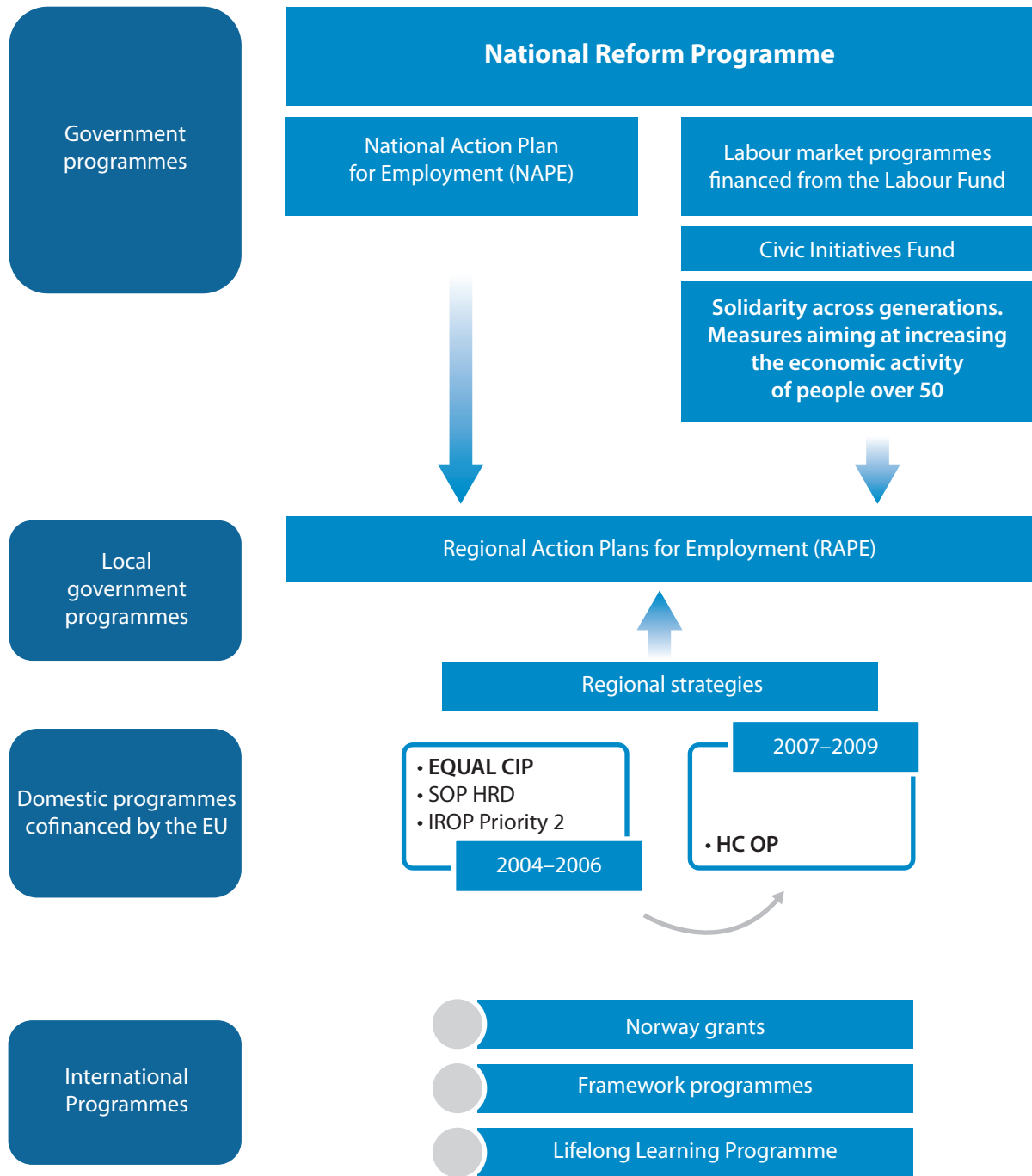
The aim of the research was **to identify, analyse and evaluate the scope of measures which favour increasing economic activity of people at an immobile age, undertaken in Poland in the years 2004–2009.**

The second part of the report starts with a description of measures related to the broadly understood equalisation of opportunities for people aged 50+/45+, which were included in central government and regional action plans favouring employment (the NAPes and RAPes). In order to obtain a broader context of the measures undertaken in the individual voivodeships, reference was made to documents of strategic importance to the development of the regions (regional development strategies, regional employment strategies, regional strategies for social policy and integration).

Measures undertaken within the framework of a separate government programme financed in whole from domestic funds, i.e. the Civic Initiatives Fund (CIF), are the subject of the subsequent chapter. The CIF has different beneficiaries than the programmes discussed in the third chapter. While employment programmes are conducted above all by public institutions, including employment offices, the CIF is targeted mainly at non-governmental organisations. Among the numerous areas of activity which may be financed from the CIF there are also initiatives targeted at people aged 50+/45+.

The source of financing undertakings related to equalisation of opportunities of different interest groups in the labour market undertaken after 2004 is the European Social Fund (ESF). The subsequent three chapters of this publication present the results of analyses related to projects financed from the ESF funds and international projects in which Polish institutions participated. The subject of analysis were projects conducted in the years 2004–2009 from the funds of the Sectoral Operational Programme Human Resources Development (SOP HRD), Integrated Regional Operational Programme (IROP), EQUAL Community Initiative Programme (EQUAL CIP), Human Capital Operational Programme (HC OP), framework programmes (FP V, FP VI and FP VII), Lifelong Learning Programme (LLP) and Norway grants.

The second part of the report finishes with a summary of the analysis of measures targeted at people aged 50+/45+ conducted within the framework of all the programmes discussed herein. To conclude, good practices of projects whose objectives were related to increasing economic activity of people at an immobile age are indicated.



**Diagram II.1.** Programmes involving the issues of equalisation of opportunities for people aged 50+/45+ in Poland in the years 2004–2009 (research process diagram)

Source: prepared by the author.

Therefore, the main points of the second part of the report concern: (1) **labour market programmes** and (2) **projects** covering the problem of equalisation of opportunities for people aged 50+/45+ in the labour market in Poland (for the years 2004–2009).

### Methodological remarks on the analysis of the labour market programmes covering the issue of equalisation of opportunities for people aged 50+/45+ in the labour market

Analysis of the labour market programmes within the framework of the *Equalising Opportunities on the Labour Market for People Aged 50+* project was performed in the following stages:

1. identification, analysis and evaluation of the objectives and measures for economic activation of people aged 50+/45+ programmed in domestic employment action plans,
2. identification, analysis and evaluation of the objectives, measures and tools of economic activation of people aged 50+/45+ included in regional action plans for employment and in regional strategic documents,
3. identification, analysis and evaluation of the measures and tools of economic activation of people aged 50+/45+ included in government programmes targeted at people aged 50+/45+,

The analysis was based on a review of source documents from the period 2004–2009 prepared at the domestic and regional levels. A catalogue of analysed documents includes sector action plans in the area of the labour market and comprehensive voivodeship development programmes, including those for employment which are of most importance from the point of view of the subject under consideration.

In the present study, due to its applicational character, conclusions from the formal analysis of the documents were omitted, and the analysis is limited to substantive content of the documents related to the situation of people aged 50+/45+ in the labour market. Due to the adopted time scope of the analyses, it was necessary to perform identification and analysis of approximately 150 source documents. As a result of the research, assessment was performed of the actions related to the issue of equalisation of opportunities for people aged 50+/45+ in the labour market in Poland in the years 2004–2009, programmed in national action plans for employment, voivodeship action plans and government programmes. Chapter 3 is limited to the most important conclusions from the performed research.

### Methodological remarks on the analysis of the projects covering the issue of equalisation of opportunities for people aged 50+/45+ in the labour market

An important element of the actions undertaken within the framework of the ESF (the main instrument for supporting actions related to the subject of the *Equalising Opportunities on the Labour Market for People Aged 50+*) project is **the issue of equality of rights**. It is related mainly to the promotion of equal rights of women and men in the labour market, providing equal educational opportunities and labour market opportunities for people who can be subject to social exclusion (including **people aged 50+**), people living in rural and neglected areas and the disabled.

The aim of the research whose results are included in chapters 4–7 of this publication was to evaluate the actions taken in the years 2004–2009 by Polish public and private institutions. It will make it possible to develop proposals for actions favouring equalisation of opportunities for people aged 50+/45+ in the labour market in Poland.

**For the purposes of performing research activities, the analysis covered projects targeted at people aged 45 and older.**

The criterion for selecting projects was support offered to people aged 50+/45+. The analysis encompassed only those projects in which the target group was at least in 50% composed of people aged 50+/45+. The projects in which people aged 50+/45+ constituted less than a half of the beneficiaries were therefore purposefully omitted as in the case of such projects one cannot speak of actions addressed specifically to the age group of 50+/45+. The analysis also covered research projects and information and promotion projects.

Identification of the projects was conducted on the basis of the available data bases and information received from intermediating institutions. In particular, the analysis was based on data from the SIMIK base (<http://www.funduszeuropejskie.gov.pl>), *Grants map* prepared by the Ministry of Regional Development (<http://www.mapadotacji.gov.pl>), data base of projects accomplished within the framework of EQUAL CIP (<http://www.equal.org.pl>), *CIF Grants map* (<http://fio.pozytek.gov.pl>), compendiums of the Lifelong Learning Programme and framework programmes as well as catalogues of good practices of ESF projects. In total, nearly 8 thousand projects accomplished in the years 2004–2009 were analysed.

The review of data bases made it possible to identify programmes and projects targeted at people aged 50+/45+. For the purposes of further stages of the research, a base of projects targeted at people from this age group was prepared. The aim was to conduct a comprehensive research which fully evaluates the actions taken in order to equalisation of opportunities for people aged 50+/45+ in Poland. The work performed resulted in identifying the total number of **358 projects** accomplished (completed) in the period from 1 January 2004 to 31 December 2009. Most undertakings targeted at people aged 50+/45+ were accomplished in the present financial perspective (2007–2013), and the main source of project financing was the Human Capital Operational Programme (two out of three projects identified for the purposes of the research were implemented within the framework of the HC OP).

The preliminary Internet research performed in the period from September to December 2010 and direct contact with intermediating institutions and institutions implementing operational programmes, as well as with the beneficiaries — projects' implementers, made it possible to prepare cards of projects targeted at people aged 50+/45+. An example of a card prepared for the purposes of the study for one of the projects is presented in Appendix A.

In order to ensure more clarity and a simpler link between the input and results, the projects' analysis, whose results were presented in Chapters 4–7, was performed according to the structure of the operational programme. This determines the structure of Part II of this publication. The discussed projects can also be grouped on the basis of the main subject area. Following these assumptions, the projects were divided into the following areas related to Equalising Opportunities on the Labour Market for People Aged 50+/45+<sup>28</sup>:

- 1) increasing the competences of employed people aged 50+/45+,
- 2) economic activation of the unemployed aged 50+/45+,
- 3) promotion of flexible forms of employment, reconciliation of family life with professional life;
- 4) promotion of the idea of lifelong learning, shaping relations between employers and employees,
- 5) increasing social activity, intergenerational transfer of knowledge.

Due to the main objectives of the *Equalising Opportunities on the Labour Market for People Aged 50+* project, an attempt was made to indicate examples of initiatives which are recommendable and should be emulated. Selected good practices are related to the accomplishment of projects whose central axis is formed by objectives and actions targeted at people aged 50+/45+ or whose implementation could in effect — although sometimes indirectly and not immediately — contribute to improving the situation of this group in the labour market. While preparing descriptions of selected good practices (cf. Chapter 8), projects targeted at people aged 50+/45+ whose objectives were not directly related to economic activity of people from this age category, but were concerned with intergenerational transfer of knowledge and social activation of people aged over 50+ (especially after retirement) were excluded from among the five types of projects indicated above. Projects aimed at social activation of people aged 50+/45+ are of course important for the overall development of attitudes and skills which shape a person, in a broad perspective (they promote general development). However, initiatives whose training measures concerned only general capabilities cannot, from the point of view of applicability of the gained abilities for the purpose of the labour market, form a basis for drawing positive conclusions about improving the opportunities of the ultimate beneficiaries of these initiatives concerning finding

<sup>28</sup> The procedure did not cover projects implemented within the framework of Phare.

employment. For this reason, in order to avoid the “idle gear effect”, when indicating examples of interesting projects supporting people aged 50+/45+ in the labour market emphasis was placed on those initiatives which are more probable to bring positive effects in the form of an increase in employment among the 50+ group, i.e. those whose objectives were related to economic activity of people aged 50+/45+.

Due to the fact that the projects accomplished within the framework of the CIF are not in the major part targeted at economic activation of people aged 50+/45+, but at the broadly understood social activation (also with reference to the broadly defined group aged 50+/45+, including mainly people at a pre-retirement age), this group of projects was excluded from the presented set of good practices.

**The process of selecting projects as good practices** was divided into two stages.

As part of the **first stage of selection**, projects were classified on the basis of their main subject, with the analysis limited — as indicated above — to the first four categories of projects (i.e. omitting the type of projects described in point 5). Good practices were therefore indicated only with reference to projects directly related to equalisation of opportunities for people aged 50+/45+ **in the labour market**.

As part of the **second stage of selection** an in-depth analysis was performed, which made it possible to choose two most interesting projects for each of the identified areas. The main criteria for project selection were: evaluation of the quality of a given project and evaluation its effectiveness.

In order to assess the quality of a project the following sets of questions were used:

1. *Were the measures performed as part of the project appropriate considering the needs of people aged 50+/45+?*

The condition was considered to be satisfied if the measures performed as part of a given project referred to solving problems of people aged 50+/45+ in the labour market or increased their chances of succeeding in this market.

2. *Was the project innovative in character (unique)?*

The condition was considered to be satisfied if a given project had unusual, in the context of other projects of a given category, qualities related to: (i) the beneficiary’s attitude to planning project measures (e.g. identification of specific needs of people aged 50+/45+), (ii) the beneficiary’s attitude to the envisaged results of the project (e.g. preparation of a model solution which could be successfully applied in another place by a different beneficiary).

3. *Did the project contain elements which deserve to be emphasised and promoted?*

The condition was considered to be satisfied if a given project, due to its characteristics (e.g. successful cooperation between different institutions for the benefit of economic activation of people aged 50+/45+, application of modern methods of transfer of knowledge such as coaching, job rotation), deserved to be indicated as an example of a good practice in a given area.

The criteria of the qualitative evaluation had the zero-one form. Inclusion of particular projects to the subsequent stage of selection (effectiveness evaluation) depended on whether they satisfied all the conditions.

As part of the effectiveness evaluation of a project the following issues were analysed:

1. *Were all the actions planned for a given project accomplished?*

The condition was considered to be satisfied if all the project measures set out in the application form were fully accomplished.

2. *Were all the indicators planned for a given project reached (or exceeded)?*

An average level of exceeding indicators set for a given project expressed as a percentage made it possible to arrange (order) the projects which fulfilled both effectiveness criteria.

Moreover, in the project selection process an attempt was made to reflect the differences between the individual projects with regard to:

- scale of projects (large projects with a large number of different measures and small projects with a small number of activities),
- value of projects (projects with a relatively high value for a given area of support and projects with a relatively low value),
- number of beneficiaries (projects targeted at a large or small number of beneficiaries),
- geographical area of project implementation (projects accomplished in the territory of a number of voivodeships and projects for one commune),
- period of project implementation (mid- and long-term projects lasting more than 6 months and short-term projects lasting not more than 6 months).

**In summary**, the data used in the analysis provide information on the undertakings accomplished in the period of 2004–2009 addressed to people aged 50+/45+. In juxtaposition with statistical data and information on the programmes of the labour market, it is possible to evaluate the measures related to equalisation of opportunities for people aged 50+/45+ performed so far (considering information concerning the 45+ age category). In the context of the “Solidarity across generations. Measures aiming at increasing the economic activity of people over 50”, which is an example of a comprehensive approach to the issue of equalisation of opportunities to people aged 50+ in the labour market, the study can be treated as indicating — in a microscale — the basic status of measures favouring equalisation of opportunities to people aged 50+ in the labour market in Poland.



# Chapter 3

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## National and regional labour market programmes versus economic activation of people aged 50+/45+

Introduction

3.1. Characteristics of analysed documents

3.2. Analysis of governmental programmes contents

3.3. Analysis of regional action plans for employment and regional strategies

3.4. Conclusions and recommendations



## Introduction

The aim of this chapter is to present and perform a substantive evaluation of the programmes of the labour market developed at the domestic and regional level. The main orientation of the analyses was identification of the basic measures for supporting the opportunities of people aged 50+/45+ in the labour market programmed in the selected central government and local government documents.

Performance of research made it possible to develop detailed lists of selected<sup>29</sup> measures programmed in national action plans for employment, voivodeship action plans and government programmes. This chapter contains only synthetic conclusions from the performed analyses<sup>30</sup>.

The analysis encompassed three categories of documents prepared by the central government and the local governments at the voivodeship level. The basic criterion for selecting the documents was their planning (programming) character — the documents present programmes of reforms, sector action plans in the area of the labour market and comprehensive voivodeship development programmes. The analysis covered programmes and action plans developed at the country level and all the 16 voivodeships of Poland. As a result, the prepared catalogue of documents contained:

- National Reform Programmes,
- National Action Plan for Employment,
- Regional Action Plans for Employment,
- regional development strategies, regional employment strategies and regional strategies for the social policy and integration,
- government programmes addressed to people aged 45/50+.

Another criterion for dividing the analysed documents can be formal premises for their preparation. According to this criterion, one should identify obligatory documents: National Reform Programmes, National Action Plans for Employment, Regional Action Plans for Employment, voivodeships development strategies, sector strategies of social policy, and optional ones — government programmes and sector employment strategies.

### 3.1. Characteristics of analysed documents

According to the Employment Promotion Act, the tasks of a state with regard to promotion of employment, mitigating results of unemployment and economic activation are accomplished on the basis of the National Action Plan for Employment adopted by the Council of Ministers, containing principles of the performance of the European Employment Strategy, and on the basis of initiatives of the local governments at the level of communes, poviats, voivodeship and social partners.

The National Action Plan for Employment (NAPE) constitutes an important instrument for the accomplishment of the National Reform Programme for the realisation of the Lisbon Strategy. It remains significant also in the new perspective resulting from the Europe 2020 strategy. The plan reflects the principles of the European Employment Strategy and constitutes the basis for the realisation of the tasks of a state in the area of employment policy: promotion of employment, mitigating results of unemployment and economic activation. Preparation of the National Action Plan for Employment constitutes performance of the provisions of Article 3 of the Em-

<sup>29</sup> This refers to measures for economic activation of people aged 50+/45+.

<sup>30</sup> The conclusions complementing the analyses related to the measures programmed in regional strategic documents result from research conducted within the framework of another component of a research project (internal report entitled *Analysis of the domestic and regional strategies from the point of view economic activation of people aged 50+/45+*, prepared by the authors of Chapter 3).

ployment Promotion Act and the provisions of Article 145 and Article 148 of the Treaty on the Functioning of the European Union (*Dziennik Ustaw* of 2004 No. 90, item 864/2 as amended)<sup>31</sup>.

The draft of the National Action Plan for Employment is prepared by the minister relevant for labour in cooperation with, in particular: the minister relevant for economy, the minister relevant for education and schooling, the minister relevant for higher education, the minister relevant for the development of rural areas and the minister relevant for regional development. The NAPE defines:

- the objectives and directions of measures in line with the priorities of the national policy in the area of the labour market,
- the envisaged amount of funds, including the Labour Fund and the state budget, for financing measures resulting from the National Action Plan,
- indicators of effectiveness of the National Action Plan.

The Council of Ministers, within the framework of the National Action Plan, can adopt government programmes for the promotion of employment and prevention of unemployment aimed at economic activation of the unemployed (Article 3, paragraph 5 of the Employment Promotion Act).

In relation to the accomplishment of the provisions of the National Action Plan for Employment, the minister relevant for labour had the obligation to prepare an annual report on its realisation, pursuant to the provisions of Article 4, paragraph 1, point 5 of the Employment Promotion Act.

Article 3, paragraph 4 of the Employment Promotion Act places an obligation on the local governments of voivodeships to prepare annually, on the basis of the National Action Plan for Employment (taking into account strategies of voivodeship development and the voivodeship strategy for social policy<sup>32</sup>), Regional Action Plans for Employment (RAPE). Voivodeship local governments, after consulting poviats local government units and social partners, prepare a RAPE specifying the preferred regional programmes, local programmes, priority groups of the unemployed and other people needing support.

Among the government programmes one can indicate packages of measures proposed by the government and government programmes for the labour market financed from the reserve of the Labour Fund. The Labour Fund is a state purpose fund whose main sources of revenue are contributions paid by employers, grants from the state budget and funds from the budget of the European Union for co-financing projects financed from the Labour Fund. The minister relevant for labour decides on the allocation of the reserve of the funds of the Labour Fund in the amount of 10% of the amount of funds specified in the Labour Fund plan for financing tasks specified in the Employment Promotion Act, in accordance with the Ordinance of the Council of Minister of 22 January 2008 on the algorithm for determining amounts of funds of the Labour Fund for financing tasks in voivodeships (*Dziennik Ustaw* of 2008 No. 18, item 114 as amended)<sup>33</sup>. The minister relevant for labour, within the performed function of an officer responsible for funds from the reserve of the Labour Fund, processes the applications of poviats local governments with regard to funds needed for undertaking measures within the framework of active labour market policy, directed especially to people being in a difficult situation in the labour market, **including people over 50**. Their realisation is performed at the level of territorial governments through projects submitted by poviats employment offices. The verification and evaluation of these projects is performed by voivodeship employment offices. In this way, the voivodeship employment offices accomplish their statutory task of coordinating on the territory of their voivodeship of the realisation of projects for economic activation, financed from the reserve of the Labour Fund managed by the minister relevant for labour.

<sup>31</sup> It should be added here that within the framework of the EU there is now no requirement of preparing the NAPE, but only the National Reform Programme.

<sup>32</sup> Due to the nature of the study, the features of these strategies will not be discussed in detail.

<sup>33</sup> At present these issues are regulated by the Ordinance of the Council of Minister of 17 July 2009 on the algorithm for determining amounts of funds of the Labour Fund for financing tasks in voivodeships (*Dziennik Ustaw* of 2009 No. 123, item 1019).

## 3.2. Analysis of governmental programmes contents

The labour market policy is one of the areas of reforms envisaged in mid-term programmes developed by the government. Among these there are measures targeted at people aged 50+/45+. In the National Reform Programme for the years 2005–2008, realisation of measures for people aged 45/50+ was included in Priority 5: Creation and maintaining new work places, and Priority 6: Improve adaptability of workers and enterprises through investments in the human capital. Activation measures envisaged within Priority 5 were targeted at people from groups being in a specially difficult situation in the labour market. It was clearly noted that the problem of lack of employment often concerns the elderly (50–64 years), who left the labour market as a result of the deactivation policy, contributing to the decrease in the economic activity indicator in this group, especially in the case of people with lower education and qualifications. Priority 6 was to be performed through: increasing flexibility and diversity of forms of employment and labour organisation and investments in the human capital. It was considered necessary to increase the quality and effectiveness of education and vocational training and adjusting the education offer to the needs of the labour market. It was also regarded as necessary to undertake measures encouraging adults to participate in lifelong learning opportunities and measure supporting people in a difficult situation: without professional qualifications, elderly, unemployed (including from the so-called risk groups) (a detailed list of instruments used for accomplishing the priorities is presented in Table II.1.).

**Table II.1.** Measures for economic activation of people aged 50+/45+ under the National Reform Programme for the years 2005–2008

Instruments	Results
<b>Priority 5.</b>	
<b>Creation and maintaining new work places and reducing unemployment</b>	
<b>5.5. Activation of people from groups being in a specially difficult situation in the labour market</b>	
<p><b>Institutional/organisational tools:</b></p> <ul style="list-style-type: none"> <li>• emphasis on the accomplishment of economic activation programmes of people particularly prone to unemployment, including with participation of non-governmental organisations acting within the local labour markets;</li> <li>• monitoring of the effectiveness of the undertaken measures;</li> <li>• development of social employment;</li> <li>• creation of Social Integration Centres;</li> </ul> <p><b>Legislative tools:</b> continuation of works on a law on social cooperatives.</p>	<p>Increase in the participation of people suffering from long-term unemployment or people particularly prone to structural unemployment covered with active policies of the labour market. Better addressing of public measures of the employment services.</p>
<b>Priority 6.</b>	
<b>Improve adaptability of workers and enterprises through investments in the human capital.</b>	
<b>6.1. Increase flexibility and diversity of forms of employment and labour organisation</b>	
<p><b>Institutional/organisational tools:</b> propagating knowledge on the possibilities of finding jobs within different forms of employment; broad application of flexible forms of employment.</p> <p><b>Legislative tools:</b> the existing legislative solutions make it possible to use flexible forms of employment and implement new forms of work organisation.</p>	<p>Increasing work mobility and spatial and trans-border mobility of the employed and people seeking employment</p>

6.2. Investments in the human capital	
<p><b>Institutional/organisational tools:</b> supporting educational services, including the development of educational institutions, programmes, methods and forms of lifelong learning</p> <ul style="list-style-type: none"> <li>• measures for improving the quality of education and training (standards of education and examination, development of the system of accreditation of lifelong learning institutions, a system of validation and certification of qualifications obtained outside the education system);</li> <li>• synchronisation of educative contents and programmes and vocational training with the needs of the labour market on the basis of professional qualification standards;</li> <li>• development of a system of professional counseling services;</li> <li>• development and implementation of the “Lifelong Learning Strategy”;</li> <li>• improving information resources on lifelong education and promotion of the idea of lifelong learning, and intensification of cooperation with social partners;</li> <li>• supporting of the development of distance education (e-learning);</li> <li>• elimination of barriers in access to education, in particular due to poverty.</li> </ul> <p><b>Legislative tools:</b> implementation of legal solutions favouring increasing the demand for educational services and increasing the participation of adults in lifelong learning, and solutions favouring improvement of the quality of education and training: amendment of the Employment Promotion and Institutions of the Labour Market Act — obligatory use of training fund.</p>	<p>Increase in the participation of adults, in particular from the so-called risk groups, taking part in lifelong learning</p>

Source: Prepared on the basis of the National Reform Programme for the years 2005–2008.

The National Reform Programme for the years 2008–2011 envisaged a number of measures referring to activation of people aged 45/50+. This issue is dealt with by Priority 1. Active society. The activation measures for people aged 50+/45+ programmed as part of Priority 1 along with the instruments for their accomplishment are presented in Table II.2.

As follows from the above points, the basic instrument for implementation of the National Reform Programme is the National Action Plan for Employment.

In its diagnostic parts, the National Action Plan for Employment emphasises the low level of economic activity of persons over 50 and the significant participation of this group among the long-term unemployed. The diagnosis also points to the problem of professional qualifications inadequate in the context of the needs of the labour market and the low educational activity of this group of people. These features have a negative impact on the ability to adapt to changes by people aged 50+ and their ability to commence work as well as on their attractiveness as potential employees. People from this age group are therefore unattractive from the point of view of the needs of the labour market.

In addition, the “Solidarity across generations. Measures aiming at increasing the economic activity of people over 50” programme mentions other factors eliminating people over 50 from the labour market; these include: opinions and attitudes of employers towards people aged 50+ (negative stereotypes concerning their effectiveness of their work, discriminatory behaviours among employers, which suggest that investments in training or requalifying this group of employees are unprofitable) and features and attitudes of people aged 50+ (fear about the challenges of the labour market in this group of people, inferior health condition, disability and the willingness or necessity of taking care of other members of the family).

The problems diagnosed in the NAPE are reflected in the analytical parts for 2007 and 2008 (SWOT analyses). In different years the programmes did not contain analyses of the conditions for the employment policy implementation.

The NAPE for 2007 and 2008 includes in the weaknesses of the Polish labour market the high level of unemployment, which is characterised e.g. by the high and ever growing participation of unemployed people from older age groups, in particular the elderly (50 years and more). The progressing process of demographic aging of the population is interpreted as a danger for the stability of the situation on the labour market.

The postulatory part of the NAPE under examination contains points which formulate priorities, objectives and measures targeted directly and indirectly at people aged 50+/45+; there are priorities and measures dedicated particularly to this group of people in the NAPE for 2005 and 2006, and an action plan in the NAPE for 2009–2011.

**Table II.2.** Measures for economic activation of people aged 50+/45+ under the National Reform Programme for the years 2008–2011

Tasks and instruments	Expected results
<b>Measure 1. Development of education in society and in knowledge-based economy</b>	
<ul style="list-style-type: none"> <li>• Development and implementation of the “Lifelong Learning Strategy” along with the resulting legislative and institutional instruments.</li> <li>• Development of the <i>Reform of the system of university education in the area of functioning and financing of universities and the Reform of the system of university education in the area of the model of academic career.</i></li> <li>• Dissemination of modern methods of information and communication in the process of education and self-study.</li> <li>• Taking measures aimed at improving professional qualifications of employees in different industries (e.g. in tourism).</li> <li>• Realisation of the measure will be supported by instruments envisaged in the government 50+ Programme (“Solidarity across generations. Measures aiming at increasing the economic activity of people over 50”).</li> </ul>	<p><b>Direct result:</b> Creating a framework and conditions for an effective education process as a response to the challenging of the global economy.</p> <p><b>Indirect result:</b> Due to an improvement of professional competences and key competences of young people and adults, there will be an improvement in the quality of the human capital, which will have an impact on the increase in employment.</p>
<b>Measure 2. Modernization of the social security system: realisation of the social insurance reform principles and conducting actions leading to the postponement of employees’ deactivation in the labour market</b>	
<ul style="list-style-type: none"> <li>• Continuation of the social insurance reform implemented since 1999 and improvement of the social insurance system and the pensions and disability pensions system.</li> <li>• Development of incentives promoting opening of individual pension accounts and creating norms regulating the creation and functioning of open pension funds of the new type.</li> <li>• In order to secure payments of pension benefits the period of transferring contributions to the Demographic Reserve Fund will be prolonged.</li> <li>• Preparation and implementation of the following laws:               <ul style="list-style-type: none"> <li>— law on lifetime capital pension funds,</li> <li>— law on capital pensions,</li> <li>— law on bridging pension scheme,</li> <li>— law on changing the act on pensions and disability pensions paid from the Social Insurance Fund (SIF) and some other acts — introducing new rules for calculating disability pensions for people born after 31 December 1948,</li> <li>— amendment of the act on individual pension accounts,</li> <li>— creating statutory norms regulating the creation and functioning of open pension funds of the new type.</li> </ul> </li> </ul>	<p>The introduced changes adjust the system to demographic and socio-economic changes and will encourage the insured to continue economic activity. They will also contribute to an increase in solidarity across generations which will be the basis of effective realisation of the government policies.</p> <p>The reform will limit the risk of default of the pension system in the long term and will have a positive impact on the state of the public finance in the middle term.</p>
<b>Measure 3. Active labour market policies<sup>34</sup></b>	
<p>3.2. Implementation of the system of incentives encouraging people at risk of unemployment and social exclusion to be more active in the labour market, in particular extending the duration of economic activity and return of people aged 50+ to the labour market<sup>35</sup></p>	
<p>Concentration of the public employment services on economic activation of people from groups at risk of unemployment and social exclusion, including supporting employment of persons over 50.</p> <p>Instruments of implementation:</p> <p><b>Organisational:</b> “Solidarity across generations. Measures aiming at increasing the economic activity of people over 50” programme, National Action Plan for Employment for 2009–2011 and the HC OP.</p> <p><b>Legislative:</b> amendment of the Employment Promotion and Institutions of the Labour Market Act.</p>	<p>As a result of the implementation of the sub-measure, the ratio of employment of people aged 55–64 will increase and the level of social exclusion of unemployed persons in a pre-retirement age will decrease.</p> <p>The spending from the budget on social welfare benefits will also decrease.</p> <p>The implemented strategies for age management will make it possible to build solidarity across generations.</p>

Source: Prepared on the basis of the National Reform Programme for the years 2008–2011.

<sup>34</sup> Measure 3.1., omitted in the table, is aimed at improving the functioning of public employment services. It does not include tasks aimed at economic activation of people aged 50+/45+.

<sup>35</sup> People at risk of social exclusion also include: women, youth, inhabitants of rural areas, the disabled. The table includes only measures aimed at economic activation of people aged 50+/45+.

In the National Action Plans for Employment, the unemployed aged 50+/45+ constitute only one category of the beneficiaries of the measures planned within the framework of economic activation of people in a particularly difficult situation in the labour market.

The main directions of the activation measures for people aged 50+/45+ included in the NAPE and the stages of their implementation are presented in Table II.3.

**Table II.3.** The planned and implemented measures targeted at people aged 50+/45+ included in the National Action Plan for Employment

Measure direction	Task and objective	Implementation
<b>NAPE/2009–2011</b>		
Building coherent of the labour market	Task 1.2.1. Activation of people aged 50+. Equalising Opportunities on the Labour Market for People Aged 50+ (task 1.2.1.1.)	There has been no report on the implementation of the NAPE/2009–2011 for 2009.
	Objective: Increasing economic activity of people aged 50+, their employment for longer periods, promotion of active aging	
	Task 1.2.1. Activation of people aged 50+. District integration and work places for people aged 50+ (task 1.2.1.2.)	
	Objective: Improvement of the quality and effectiveness of the functioning of institutions in the area of social aid and labour market at the commune level, acting for the benefit of people at risk of social exclusion due to unemployment and aged 50+.	
	Task 1.2.7. Comprehensive support for people without employment at the regional labour market.	
Objective: Increasing the level of economic activity and employment capability of people who are unemployed or economically inactive, including in particular people aged 50+, women and people wishing to reconcile family duties with professional responsibilities, youth starting their professional career, people inhabiting distant areas, people suffering from social exclusion or at risk of social exclusion and the disabled.		
Broadening the use and improvement of the targeting of the instruments of active policy in the labour market and application of an individualised approach to people using the services of the public employment services	Task 3.1.3. Intensification of measures undertaken with regard to the unemployed in a particularly difficult situation in the labour market.	
	Objective: Creation of additional possibilities of activating the unemployed through allocation of the funds from the Labour Fund from the minister's reserve to economic activation projects for the unemployed in a particularly difficult situation in the labour market.	



NAPE/2008		
Activation of people from groups being in a particularly difficult situation in the labour market	Task 4.1. Improvement of the access to employment and supporting economic activity in the region.	The task was accomplished as planned. 326 agreements for co-financing projects were concluded of the total value of 213,285.5 thousand PLN. As part of the undertaken measures, the support encompassed 86,649 people, including 7067 people aged 50–64 (including 3450 women and 3617 men).
	Objective. Increasing the level of economic activity and employment capability of people who are unemployed or economically inactive, including in particular people in a particularly difficult situation in the labour market (including those aged 50+).	
Implementation of new organisational and financial solutions ensuring increased access to the labour market services and improving the offer and the quality of services provided by the institutions of the labour market and cooperating organisational units	Task 2.10. Co-financing of the tasks from the Labour Fund with regard to active labour market policies.	The principles and criteria were developed related to the allocation of additional funds for implementation of activation programmes for the unemployed from rural areas and towns with the population of up to 25 thousand and for implementation of the 45/50 PLUS programme — projects addressed to people in a particularly difficult situation in the labour market.
	Objective. Improvement of the effectiveness of the use of the funds from the Labour Fund and increase of the scope of implementation of projects related to employment promotion, mitigating results of unemployment and economic activation co-financed from the funds of the European Social Fund.	Allocation of resources from the minister's reserve was preceded by assessment according to the criteria for evaluation of applications, with a preference for projects characterised by high effectiveness, involved in the ESF. In total, until 31.12.2008, 541,635.6 thousand PLN were allocated.
NAPE/2007		
Implementation of new organisational and financial solutions ensuring increased access to the labour market services and improving the offer and the quality of services provided to the unemployed, people seeking employment and employers	Task 2.5. Analysis of the possibility of adopting systemic solutions with regard to age management.	An analysis was conducted concerning the measures undertaken by the individual Member States, including Poland, in order to increase the employment ratio of people aged 50+. In particular, the examined initiatives included: (i) social security systems, such as increasing the statutory retirement age along with limiting (or a complete reduction of) the possibility of earlier retirement, introduction of incentives for employees for staying longer in the labour market, incentives for employers concerning employment of older employees, (ii) labour market policies, (iii) labour law, (iv) industrial safety and work conditions. Preparation of a report presenting various measures in different Member States of the EU in favour of active aging of employees. Conclusions of this report were used e.g. in the preparation of the "Solidarity across generations. Measures aiming at increasing the economic activity of people over 50" programme.
	Task 2.7. Changing the allocation rules according to the algorithm of the funds from the Labour Fund for financing programmes for employment promotion, mitigating results of unemployment and economic activation of the unemployed, including people aged 50+.	The rules and criteria developed in 2006 and effective in 2007 related to the allocation of additional funds from the Labour Fund from the reserve of the officer responsible for the funds (the minister) were reinforced, between the first and second half of the year, with labour market programmes ("Investment in Deficit Qualifications", "A Good Start" and "Active Woman") addressed to people in a particularly difficult situation in the labour market.
	Objective: Improvement of the effectiveness of the use of the funds from the Labour Fund and increase of the scope of implementation of projects related to employment promotion, mitigating results of unemployment and economic activation co-financed from the funds of the European Social Fund.	

Improving the offer and the quality of services provided by the institutions of the labour market and cooperating organisational units	Task 3.1. Improvement of the access to employment and supporting economic activity in the region.	Measure 6.1.1. was included in the HC OP in order to improve access to employment and increasing the level of economic activity of the unemployed and people seeking employment. The adopted objective was achieved in the 4. quarter of 2007. As part of pilot projects, in December 2007 applications were submitted for project co-financing. The group of beneficiaries included people aged 50+/45+. As part of Sub-measure 6.1.1. 177 projects which passed the formal evaluation were registered with the total value of PLN 100,968,183. However, due to the fact that in 2007 no agreements were concluded, no expenses were incurred for implementation of the projects. All the forms of aid mentioned above were launched as part of pilot competitions.
	Objective: Increasing the level of economic activity and mobility and the employability of the unemployed and people seeking employment as well as people abandoning agricultural occupations and seeking employment outside agriculture.	
<b>NAPE/2006</b>		
Optimisation of access to benefits leading to earlier deactivation of employees	Task 2.1. Increase of access of the elderly to the services of the labour market.	The task was not accomplished.
	Objective: Increasing activity of the elderly in the labour market	
Activation of people from groups being in a particularly difficult situation in the labour market	Task 7.10. Support for people over 50.	Rules were created for applying for co-financing by institutions which according to their statutes do not seek profits or allocate their profits to purposes related to the tasks accomplished by the PAED. General rules were created on the basis of which institutions can grant co-financing for people aged over 50. Within 28 out of 38 projects submitted to the competition in 2005, aid was granted to approximately 1700 people aged over 50. 348 people set up their own businesses. The paid amount was 13,901 thousand PLN (including domestic funds in the amount of 4593 thousand PLN: 3126 thousand PLN from the state budget and 1467 thousand from private funds, and EU funds in the amount of 9308 thousand PLN).
	Objective: Maintaining economic activity of people aged 50 (including the unemployed and people seeking employment — not receiving pension benefits), wishing to change or improve their situation in the labour market.	
Investments in the human capital	Task 10.2. Support for young or older people in adjusting to the requirements of the labour market.	In the "Support for economic activity of people over fifty" project, 3697 people took part in vocational counseling and training. Due to training, awareness and professional qualifications were increased among the beneficiaries entering into or returning to the labour market. The implementation of the task cost 28,166 thousand PLN (including 7578 thousand PLN from domestic funds, 20,588 thousand PLN from the EU funds). The ratio of the expenses incurred to the planned costs was 98%.
	Objective: Increasing the employment potential among young and elderly people.	

NAPE/2005		
Active and preventive measures for the unemployed and people economically inactive.	Task 1.2. Counteracting long-term unemployment and combatting this phenomenon.	<p>The proportion of the long-term unemployed in the total number of the unemployed in the 4th quarter of 2005 was 52.5%; in comparison with the 4th quarter of 2004 it increased by 3.4 percentage points and in comparison with the 2nd quarter of 2005 it decreased by 0.7 percentage points. The best results were achieved in the employment offices of the Małopolskie Voivodeship, where the proportion of the unemployed for more than 12 months in 2005 decreased from 51.18% to 49.95% in comparison with the previous year, and in the employment offices of the Świętokrzyskie Voivodeship, where 60,363 of the long-term unemployed were crossed out of the register of the unemployed (of which 44.2% as a result of employment).</p> <p>As part of the task, in 2005 368 projects were implemented of the total value of co-financing from the European Social Fund of 330,514,387 PLN, which constitutes 42.55% of the financial allocation for 2004–2006. Within the framework of the task implementation, there was vocational counseling, training and vocational preparation training, possibility of performing intervention works and public works and grants for starting business activity. As results from reports of the voivodeship employment offices, these measures also contributed to decreasing negative psychological results of long-term unemployment and increase in the motivation for further seeking employment among people who had been unemployed for more than 12 months.</p>
	Objective: Limiting the phenomenon of long-term unemployment and its causes through support for the unemployed and the long-term unemployed in the area of professional reintegration and support for the social environment of these people.	
Increase in the offer of work force and support for active aging	Task 5.2. Activation of people aged 50+.	<p>As part of the competition, 79 applications were submitted (65 submitted by local government organisations, 14 by non-governmental organisations), of which 20 received co-financing, including 12 implemented by poviats employment offices.</p> <p>On the basis of the data sent by the voivodeship employment office, it is estimated that at the end of 2005 as a result of the undertaken measures over 50 thousand unemployed people aged over 50 were activated. The implementation of the task was most effective in the Małopolskie region, where as a result of the undertaken activation 70% of the unemployed over 50 found employment.</p>
	Objective: To increase in the employment ratio for people aged 50 while maintaining the necessary social security systems for people being in the most difficult situation in the labour market.	

**Source:** Prepared by the author on the basis of the National Action Plans for Employment for 2005, 2006, 2007, 2008 and 2009–2011, and Annual reports on the implementation of the NAPes for 2005, 2006, 2007 and 2008.

The National Action Plans for Employment developed in the period from 2007 envisaged implementation of Measure 6.1. of Priority VI. *The labour market open for all* of the Human Capital Operational Programme. It envisaged economic activation of the unemployed, with particular emphasis e.g. on the elderly who have difficulty with adapting to the requirements of the modernising economy (cf. Chapter 6 of this publication).

**In the analysed NAPes, a great emphasis was also placed on propagating and building a formal system of lifelong learning (e.g. it was planned to create an institution of lifelong learning covering the whole territory of Poland) as well as popularisation of the idea of lifelong learning. The aim of these measures is to increase the participation of adults (not only aged 50+) in lifelong learning through creation of conditions facilitating constant improvement of qualifications.** In the years 2005–2009 the following actions were taken in this area:

- preparation of a proposal of changes to the provisions of Article 69 in draft amendments to the Employment Promotion Act;
- preparation of an expert opinion entitled “Supporting Lifelong Learning of Employees”;
- conducting a discussion with social partners on statutory incentives to investing in lifelong learning of employees;

- within the SOP HRD “Analysis of the effectiveness of a training fund — a statutory instrument supporting lifelong learning” project, a diagnosis was prepared assessing the application and usefulness of the training fund. Polish versions of the OECD reports “Source Report” and “Country Note” were prepared, published and distributed to employment offices and made available on the website of the MLSP. On the Ministry’s website there were also placed short descriptions of other SOP HRD projects implemented by the Labour Market Department;
- a data base covering the whole territory of Poland was created containing data on the accredited institutions offering out-of-school training;
- a register of training institutions conducting educational activity in out-of-school forms was created in all the voivodeship employment offices.

When reviewing the economic activation measures for people aged 45+ programmed in the NAPE in the individual planning periods, it can be noted that in the **NAPE of 2005 measures targeted at this category of beneficiaries to counteract their long-term unemployment were clearly distinguished**. Moreover, the plan envisaged implementation of a pilot professional activation of people over 50 under the name **50 Plus**, initiated by the Ministry of Economy and Labour. **The 50 PLUS programme is a package of measures targeted solely to people aged 50 and older. It made it possible to offer to this special category of beneficiaries support adjusted to their needs.**

It is not possible to unequivocally assess the effects of the implementation of the 50 PLUS programme due to significant divergences in the data concerning the number of activated unemployed people included in official documents. In the report on the implementation of the NAPE of 2005, it was estimated that as a result of the implementation of the 50 PLUS programme more than 50 thousand unemployed people over 50 were offered assistance (activation of 50–80 thousand people were envisaged). On the other hand, in the “Solidarity across generations” programme it is claimed that pilot projects covered 1480 people. In the report on the implementation of the National Action Plan for Employment of 2005 it was indicated that the implementation of the task was most effective in the Małopolskie region, where as a result of the undertaken activation 70% of the unemployed over 50 found employment.

A broad spectrum of measures for economic activation of people aged 50+/45+ was also programmed by the NAPE of 2006, which is a result of the adoption of the priority “*Vocational activation of people over 50*”. Its implementation was to be achieved through: creating incentives for employers to employ people aged 50+ and incentives for employees at this age to remain employed as well as conducting by the public employment services of an active pro-employment policy with regard to people in the above mentioned age category. An expression of the measures undertaken with regard to people aged 50+ was to develop rules for applying for co-financing by institutions which do not seek profits or allocate their profits to purposes related to the tasks accomplished by the PAED in the areas of supporting entrepreneurship of people over 50. What is more, the plan envisaged measures supporting these people and assistance in adjusting to the requirements of the labour market (in maintaining or returning to economic activity). In order to achieve this, the “Support for economic activity of people over fifty” project was implemented, offering support to more than 3.6 thousand people. We will return to the characteristics of this programme in Chapter 5 as it is one of the examples of application of the EU aid funds for 2004–2006. The basic conclusion from the experiences of project implementation is the **necessity of continuing initiatives aimed at increasing social awareness to ensure common understanding and acceptance of the necessity of supporting people over 50 in the labour market.**

The NAPE’s of 2007 and 2008 envisaged measures addressed at people aged 50+/45+ to a lesser extent, although the situation of this group in the labour market was considered to be particularly difficult in the diagnosis of 2007. In both cases implementation of Measure 6.1. of HC OP was envisaged, which treats people aged 50+ as one of the group of beneficiaries in a particularly difficult situation in the labour market. However, the first projects were financed as late as in 2008. **In 2007, the “Active Woman” programme and the IKD (Investment in Deficit Quali-**

**fication) programme supported women over 50, but also other people over 45 and 50.** As part of measures envisaged in 2007, research on international experiences concerning age management were also conducted, and later used when preparing the “Solidarity across generations. Measures aiming at increasing the economic activity of people over 50” programme. **A form of support addressed directly to people aged 50+/45+ was in 2008 implementation of the labour market programme financed from the reserve of the Labour Fund, 45/50 PLUS.**

The conducted analyses suggest that the very broad scope of measures for people aged 50+ is envisaged by the current National Action Plan for Employment for 2009–2011 (NAPE/2009–2011). It contains a number of activation measures targeted directly at people aged 50+. People aged 50+ were defined as a group of beneficiaries of the task consisting in comprehensive support for people without employment and from this age category at the regional labour market. **The problem of economic activation of people 50+ in the NAPE/2009–2011 was included in Priority 1. Increased activity.** People over 50 are classified as a group encountering particular difficulties in the labour market — due to the low level of economic activity, greater risk of unemployment, in particular long-term unemployment, and insufficient competences in comparison with the needs indicated by the labour market. In the description of the priority it was emphasised that activation of people aged 50+ should include limiting incentives for resigning from work in favour of benefits from the social insurance system. Moreover, it would also be recommendable to encourage people already using such benefits, both in the productive and post-productive age, to enter into employment. Measures undertaken in this area should help to increase incentives for employers for maintaining employment and training of people aged 50+, taking on new employees from this age group and adjusting work conditions to their capabilities and needs.

The NAPE/2009–2011 focuses, within the framework of the priority mentioned above, on diagnostic and promotional measures reinforcing cooperation between the institutions of social welfare and labour market in activating people aged 50+ and dissemination of labour market programmes.

An interesting measure, directed at reinforcing cooperation between institutions, was included in Task 1.2.1.2. “District integration and work places for people aged 50+”. Its objective is to improve the quality and effectiveness of the functioning of the social welfare and labour market institutions at the commune level, supporting people at risk of social exclusion due to unemployment and aged 50+.

Measures envisaged in the NAPE/2009–2011 are parallel to the tasks planned for implementation within the “Solidarity across generations. Measures aiming at increasing the economic activity of people over 50” programme, within objective 4. *Activation of the unemployed and people at risk of losing their jobs aged over 50.* They are in line with the idea of solving problems in the labour market set out in the NAPE/2009–2011. **The “Solidarity across generations. Measures aiming at increasing the economic activity of people over 50” programme should be evaluated as a package of measures of a comprehensive character, proposing systemic solutions (both legislative and non-legislative) targeted directly at people aged 50+/45+, both unemployed and employed (in particular those at risk of dismissal or wishing to change their job) and economically inactive.**

The “Solidarity across generations. Measures aiming at increasing the economic activity of people over 50” programme is the first and so far the only programme which in a systemic and comprehensive way addressed the problems of economic activation of people over 50.

The preparation of the programme was preceded by numerous analyses. The programme envisaged a package of measures adjusted to the needs and possibilities of people aged 50+ and profiled depending on age with regard to: improvement of work conditions, qualifications, lowering the costs of employment, economic activation, including the disabled, development of ser-

vices facilitating reconciliation of work with family life, increasing the effective retirement age<sup>36</sup> and equaling the retirement age of women and men. **The planned measures constitute a response to the problems of people over 50 in the labour market**, indicated in the diagnostic part of the programme. The programme implementation document contains a list of tasks, but does not specify the envisaged effects of their accomplishment. Most of the planned tasks envisages co-financing from the European Social Fund, constituting implementation of the priorities of HC OP, complementing domestic funds with EU funds.

The aim of the programme is to create a mechanism of incentives for employers taking on elderly people; it does not envisage any tax rebates, but solutions within the social insurance system (exemptions from paying contributions to the Labour Fund and the Guaranteed Employee Benefits Fund). In the programme, a number of legislative changes was proposed, most of which have been accomplished<sup>37</sup>. The programme also envisaged broad measures of promotion and information character in the area of economic activation of people aged 50+ and age management by employers and employees; this leads us to assume that its implementation will contribute to dissemination of information on this subject in a longer time perspective.

In the “Solidarity across generations” programme, the importance of initiating partnerships for implementation of the adopted objectives is emphasised, in particular with employers and society.

### 3.3. Analysis of regional action plans for employment and regional strategies

Regional action plans for employment (RAPE) adopted in the period under analysis treat people aged 50+ as one of the priority groups among the unemployed and people at risk of unemployment. This translates into directions of measures and tasks in the individual years of the RAPE implementation. Diagnostic parts of these documents do not, however, contain broad and multi-faceted diagnosis of the situation of this category of the unemployed in the regional labour market, although there exists research in this area.

The diagnosis should encompass an analysis of both quantitative data (review of regional statistics) and qualitative data, reflecting opinions on conditions and tools for activating of people aged 50+/45+ communicated by these people, employers and the public employment services.

As in the NAPE, **all the RAPEs envisage measures propagating lifelong learning**, such as: information campaigns in the area of benefits from increasing or complementing formal qualifications, programmes of formal lifelong learning addressed to adults interesting in complementing or improving their education as well as general and professional qualifications, support for lifelong learning institutions, practical education institutions and vocational training institutions.

<sup>36</sup> The effective retirement age, i.e. the age at which one effectively retires from work.

<sup>37</sup> Most legislative measures included in the “Solidarity across generations” was accomplished by the government through preparation of the following legislative changes: (1) law on bridging pension scheme, (2) amendment of the Act on pensions and disability pensions paid from the Social Insurance Fund (elimination of decreasing or suspending disability pension payments as a result of finding employment by the disabled — President’s veto), (3) Amendment of the Act on employment promotion, (4) amendment of the Act of 4 March 1994 on the company social insurance fund, (5) amendment of the Act of 13 July 2006 on protection of employee claims in an event of employer’s insolvency, (6) amendment of the Act of 26 June 1974 the Labour Code (for more information on this subject see Chapter 2 of this report).

The RAPE, as part of economic activation of people in a particularly difficult situation in the labour market, provides measures targeted e.g. at people aged 50+ in almost all the voivodeships. **As most measures are planned within the general priority, in which people aged 50+/45+ constitute only one of many groups of beneficiaries, support does not provide for specific instruments adjusted to the needs and requirements of such people (lack of individualised support).**

The RAPEs propose above all general tools for activating people aged 50+/45+, resulting from the Employment Promotion and Institutions of the Labour Market Act. A broader set of instruments for activation of this group was envisaged only in the following voivodeships: Małopolskie, Lubuskie, Łódzkie, Opolskie and Pomorskie.

The Małopolskie Voivodeship envisaged promotion and information measures, in the Lubuskie Voivodeship — dissemination of good practices, and in the Łódzkie, Opolskie and Pomorskie Voivodeships diagnostic and research projects were envisaged aimed at diagnosing the situation of people aged 50+ at the regional labour market. Detailed information on the instruments and measures in the above voivodeships is contained in Table II.4.

**Table II.4.** Selected directions of activation measures for people aged 50+/45+ in the regional labour markets

PROGRAMME	MEASURE DIRECTION	TASKS AND TOOLS	MEASURE OBJECTIVE
<b>Lubuskie Voivodeship</b>			
RAPE 2005	Promotion of flexible forms of employment.	<p>Increasing knowledge on the possibilities of using flexible forms of employment.</p> <p>Tools:</p> <p>The local government of the voivodeship participated (within the scope specified by the Ministry of Economy and Labour) in a promotion and information campaign targeted to both employers and people at a particular risk in the labour market. The campaign focused on presentation of flexible forms of employment not as a worse form of employment, but an attractive alternative solution opening up possibilities of entering into the labour market and development for people at a particular risk, i.e. youth, women and the elderly as well as the disabled. In particular, self-employment was promoted through implementation of innovative legal and organisational solutions.</p> <p>In parallel, flexibility of works related to organisational changes were promoted, e.g. telework, job and task rotation, functional flexibility (introducing changes with regard to the tasks of a given employee depending on the changes in the task of the company). The task was implemented with an active participation of social partners.</p>	<ul style="list-style-type: none"> <li>• increasing knowledge on the possibilities of using flexible forms of employment,</li> <li>• increasing the use of flexible forms of work,</li> <li>• change of the image of people working using flexible forms, especially among employers and youth, the elderly, women and the disabled.</li> </ul>
RAPE 2006	Promoting an attempt to work in line with the cycle of life of a person.	<p>Attracting to the labour market and maintaining a greater number of people, increasing the job offer.</p> <p>Tools:</p> <p>Active policies of the employment services were promoted with regard to people over 50 (e.g. through dissemination of good practices).</p> <p>Support for people over 50 in returning to the labour market through forms of training and subsidised employment.</p>	<ul style="list-style-type: none"> <li>• activation of people aged 50+,</li> <li>• offering different forms of counteracting the results of unemployment to at least 2000 people over 50,</li> <li>• dissemination of good practices in the area of undertaking measures for people aged 50+</li> </ul>

Łódzkie Voivodeship			
RAPE 2008	Improving information on the labour market.	Task 3.1. Development and improvement of the monitoring of deficit and surplus professions, including: Building knowledge on the potential of the labour resources in the Łódzkie Voivodeship in the context of economic changes in the region on the basis of research, including: "Employees aged over 45 as perceived by employers".	<ul style="list-style-type: none"> <li>description of the situation of people at an immobile productive age and identification of criteria according to which employers evaluate employees and job candidates.</li> </ul>
Małopolskie Voivodeship			
RAPE 2008	Dissemination of life-long learning.	<p>"Active until retirement and not only. . ." project.</p> <p>Within the project, the following measures were implemented:</p> <ul style="list-style-type: none"> <li>information and promotion measures conducted in order to increase the awareness concerning the need of maintaining people over 50 in the labour market,</li> <li>training for 150 people aged 50+ in the area of: social and professional competences, human resources management and coaching and mentoring; as a result, pilot implementation of coaching and mentoring methods in Małopolskie enterprises.</li> </ul>	<ul style="list-style-type: none"> <li>economic activation of 150 employees over 50 from Małopolskie enterprises,</li> </ul>
Opolskie Voivodeship			
RAPE 2008	Improving information on the labour market.	Conduction of research on the situation of the unemployed aged 50+.	No information
Pomorskie Voivodeship			
RAPE 2009	Streamlining the regional labour market.	<p>"Opportunities and barriers concerning employment of people aged 45+ in the Pomorskie Voivodeship" project.</p> <p>The project was submitted by the voivodeship employment office in Gdańsk and encompassed research on the employers from the Pomorskie Voivodeship, 2 reports on the research and analyses, a dissemination conference, 8 dissemination meetings, media campaign.</p>	<ul style="list-style-type: none"> <li>identification of opportunities and barriers concerning employment of people aged 45+ in the Pomorskie Voivodeship, recommendations for poviats local governments and the local government of the Pomorskie Voivodeship aimed at increasing employment of people aged 45+.</li> </ul>

**Source:** Prepared on the basis of: Regional Action Plan for Employment for the Lublin Voivodeship for 2006, Regional Action Plan for Employment for the Lublin Voivodeship for 2005, Regional Action Plan for Employment for the Łódzkie Voivodeship for 2008, Regional Action Plan for Employment for the Małopolskie Voivodeship for 2008, Regional Action Plan for Employment for the Opolskie Voivodeship for 2008, Regional Action Plan for Employment for the Pomorskie Voivodeship for 2009.

**The RAPes very rarely indicate whether the programmed measures for economic activation of people aged 50+/45+ constitute implementation of government programmes or an initiative of the voivodeship employment offices.** Only eight voivodeships (Dolnośląskie, Lubuskie, Łódzkie, Mazowieckie, Podkarpackie, Śląskie, Wielkopolskie and Warmińsko-mazurskie) clearly indicated participation in the 50 PLUS pilot programme (2005), and sporadically (in the Lubuskie, Łódzkie and Świętokrzyskie Voivodeships), in the "Solidarity across generations" programme (2009), which envisages engagement of the local government in its implementation.

**It should be underlined that despite the adoption in 2008 of the "Solidarity across generations" government programme, in the RAPes from this period it is not possible to find parts of the priorities and tasks indicated in the programme for implementation in 2009 by the voivodeships.**

Effective implementation of the objectives of the labour market policy with regard to people aged 50+/45+ requires greater coordination and integration of measures at the state and local government levels.

It may be a concern that although the voivodeship employment offices have decision-making powers in the area of allocation of funds earmarked for programmes for employment promotion, mitigating the results of unemployment and economic activation financed from the Minister's re-



serve, the RAPEs very rarely indicate measures related to their implementation and addressed to people aged 50+/45+ (such as: The 45/50 PLUS programme, “Active Woman” and IKD). As underlined earlier, from among the indicated programmes two are dedicated solely to people aged 50+/45+ (the 45/50 PLUS programme and “Active Woman”), while the IKD programme indicates these people as one of the groups of beneficiaries. However, the listed programmes are characterised by a small-scale impact, although the significance of the 45/50 PLUS programme clearly increases due to its implementation in a longer time perspective (the initiative was started in 2008 and was meant to continue until 2011) and its inclusion as an instrument in the implementation of the government package of measures for people aged 50+/45+, the “Solidarity across generations” programme.

In the first year of implementation of the 45/50 PLUS programme, the poviats local governments spent the total sum of **90 million PLN**. The greatest activity in obtaining funds from this source was exhibited by the PEOs from the Mazowieckie and Śląskie Voivodeships, which received the majority of the funds. The least support, resulting from a smaller number of submitted applications, was obtained by the Opolskie and Lubuskie Voivodeships. This was reflected in the scale of economic activation measures for people aged 50+/45+ in the labour market planned in the RAPE prepared by these voivodeships.

In 2008, the implementation of the measures included in the programme cost 48.4 million PLN in total. Financial resources for the programme implementation were finally obtained by 169 poviat employment offices, which planned activation of 8911 unemployed people at an immobile age using the received aid. Measures for people aged 50+/45+ were continued in 2009. For implementation of programmes increasing economic activity of people aged 50+/45+ funds in the amount of 124 million PLN were allocated and the forms of activation covered 23.7 thousand people. Table II.5. presents information on the expenditures of the above funds.

**Table II.5.** Funds spent as part of implementation of the 45/50 PLUS programme in 2008 and 2009.

Funds spent from the Minister's reserve on the 45/50 PLUS programme	2008	2009
Funds granted (in thousand PLN)	90 000	124,241.7
Funds spent (in thousand PLN)	48,400	105,319.9
Percentage of the funds spent (%)	53,8	84,8
Number of participants	8911	23,774
People who completed the proposed forms of activation measures	no data	22,629
People employed	no data	9656
Cost effectiveness*	no data	10,912.2
Employment effectiveness (%)**	no data	42.7

\*Cost effectiveness is the cost of re-employment, calculated by dividing the amount of the expenses incurred in a given year of programme implementation by the number of people who after completing their participation in a given year within the specified forms of activation within the programme found employment, found another kind of paid engagement or started their own business in the period of up to 3 months.

\*\*Employment effectiveness is an indicator expressing the ratio of the number of people who after completing their participation in a given year within the specified forms of activation within the programme found employment, found another kind of paid engagement or started their own business in the period of up to 3 months.

**Source:** Prepared on the basis of: Ministry of Labour and Social Policy, Funds Department, Labour Fund Division, *Effectiveness of Programmes for Employment Promotion, Unemployment Effects Alleviation and Economic Activation Realised from Labour Funds Resources of Minister's Reserve in 2009*, Warszawa, August 2010.

In the analysed RAPEs, a number of measures was also envisaged resulting from the role of the VEOs as intermediating institutions of the 2nd grade for the regional component of the HC OP. Therefore, **measures were envisaged for activating people aged 50+/45+, who are treated as the priority beneficiaries of the programme. The RAPEs programme mainly measures within priorities Vi and VII of the HC OP.**

Most activation measures are provided for in Priority VI, which defines the unemployed aged 50+ as one of the priority groups. **For the RAPEs it is characteristic to faithfully copy the pro-**

**visions of the HC OP concerning the description of priorities in nearly all the voivodships. This confirms the reconstructive character of these documents and lack of the author's own initiative in their preparation.**

While attempting to draw comparisons between the interregional activation measures for the elderly programmed in the RAPEs, it was noticed that the RAPEs are characterised by different levels of detail, different internal structures and different scope of operationalisation of objectives and priorities. **This greatly hinders coordination and monitoring of the measures undertaken by the VEOs for economic activation of people aged 50+/45+.** It is also not possible to indicate which of the voivodships programmed in the RAPEs the broader measures addressed to people aged 50+/45+.

On the other hand, when analysing the provisions of the RAPE in the individual planning periods it was concluded that **in the broadest scope the measures for people aged 50+/45+ were programmed in the years 2005, 2006 and 2009, which is related to implementation of government programmes and allocation of financial resources to this aim.** These provisions are in line with the objectives and measures planned in the NAPE for these years. Also in other periods the NAPEs are coherent with the national plans (regarding people aged 50+/45+).

When evaluating voivodships with regard to programmed economic activation measures for people aged 50+/45+ one should also take into account the strategies formulated in the area of the labour market policy. The regional employment strategies are developed optionally by the voivodship employment offices. In contrast with the Regional Action Plans for Employment discussed above, these strategies are long-term and constitute a declaration of strategic priorities and directions of measures adopted by the local governments of voivodship in the area of the regional labour market policy. Within the time perspective adopted for the analyses, the current and approved employment strategies were present only in 6 voivodship (Lubuskie, Opolskie, Śląskie, Podlaskie, Warmińsko-mazurskie, Wielkopolskie). **Economic activation and equalisation of opportunities in the labour market measures, whose beneficiaries are e.g. people aged 50+/45+, were programmed only by three voivodships: Podlaskie, Warmińsko-mazurskie, Wielkopolskie, where the Warmińsko-mazurskie was the only one to plan measures addressed directly to the unemployed aged 50+.** These measures have different characteristics: activating, educational or informative and promotional. In the last two voivodships people aged 50+ were treated as one of the categories of the unemployed in a particularly difficult situation in the labour market, indicated by the Employment Promotion Act. The selected directions of activation measures for people aged 50+/45+ programmed in the voivodship strategies are presented in Table II.6.

**Table II.6.** The selected directions of activation measures for people aged 50+/45+ programmed in the voivodship strategies

Strategic objectives	Specific objectives	Measures
<b>Podlaskie Voivodship</b>		
Increase in employment	Stimulating economic activity of the unemployed	the provisions of the employment strategy in the Podlaskie Voivodship envisaged priority treatment of the unemployed requiring special support in the process of activation, including people over 50
Equalisation of opportunities and counteracting discrimination in access to jobs and education	Promotion of equality of opportunities in the labour market, including with regard to people over 50	<ul style="list-style-type: none"> <li>• information and promotion campaigns addressed to employers, employees, social and professional milieus</li> <li>• promotion of the idea of professional and social integration</li> <li>• promotion and development of new, alternative and flexible forms of employment and jobs</li> <li>• promotion and development of new forms of individual and environmental support</li> <li>• support for local self-organisation and self-help initiatives</li> <li>• promotion and support for voluntary work as a form of integration with the labour market</li> </ul>

Warmińsko-mazurskie Voivodeship		
Equality of employment opportunities	Increasing accessibility of employment, including for people over 50	<ul style="list-style-type: none"> <li>Economic activation of people over 50 through:</li> <li>offering to this group various forms of lifelong learning</li> <li>conducting by the public employment services of an active pro-employment policy with regard to people over 50, including subsidised forms of aid</li> <li>implementation of projects targeted at activation of this group of people, co-financed from the funds of the ESF</li> <li>creation of incentives for employers for prolonging employment of people with useful qualifications</li> </ul>
	Development of measures supporting activity and mobility	<ul style="list-style-type: none"> <li>promotion and support for employment, in particular in the SME sector and in the third sector, with particular emphasis on youth, women and people over 50</li> <li>promotion and information campaigns related to economic activity, entrepreneurship and mobility, including those promoting economic activity of people over 50</li> </ul>
	Development of modern forms of employment along with flexibility of employment	<ul style="list-style-type: none"> <li>development of innovative ways of returning to the labour market and reinforcing the position in this market of such groups of beneficiaries as the disabled, people over 50, women, who have to combine professional life with family life</li> </ul>
Increase in employment	Increase in competitiveness and productiveness of labour	<ul style="list-style-type: none"> <li>increase in competitiveness of services for the benefit of the aging society</li> </ul>
Wielkopolskie Voivodeship		
Increase in employment and economic activity of inhabitants. Beneficiaries of the strategic objective 1 are people aged 50+	Supporting economic activity of the inhabitants of the region	Use of the instruments and services specified in the Employment Promotion and Institutions of the Labour Market Act addressed to different groups of people who are not employed. Other forms of support granted to the unemployed: <ul style="list-style-type: none"> <li>creation and dissemination of alternative forms of employment and modern methods of work organisation</li> <li>organisation of psychological and psychosociological counseling and legal counseling</li> <li>supporting self-organisation and self-help initiatives for people seeking employment</li> <li>inclusion of social and economic partners to measures for economic activation in the region.</li> </ul>
	Promotion and support for entrepreneurship and self-employment	
	Promotion of mobility and active attitudes in the labour market	

Source: Prepared on the basis of: Podlasie Employment Strategy until 2015, Employment and Human Resources Development Strategy in the Warmińsko-mazurskie Voivodeship until 2020, Employment Strategy for the Wielkopolskie Voivodeship for 2007–2013.

To complement the analyses presented above, one should also highlight the role of regional social policy centres, which are voivodeship local government organisational units developing strategies in the area of social policy and integration. The conducted research indicates that the ongoing process of aging of society and high levels of unemployment were acknowledged in these strategies as important problems, without, however, specifying measures for the age category of 50+/45+ which could lead to improvement in the situation of the unemployed from this age group. **Economic activation of people aged 50+/45+ was programmed only in two voivodeships, Pomorskie and Dolnośląskie, within the strategy in the area of social policy and integration.** In the view of the above, **it is suggested to perform a broader and multi-faceted diagnosis of the situation of people aged 45+ in the regions, which should be conducted by the regional social policy centres.**

Similar conclusions can be drawn from the analysis of the voivodeship development strategies. Also in this case, a typical phenomenon in the regions is an increase in the proportion of people in the post-productive age and a decrease in the proportion of people in the pre-productive age in the population structure. Four voivodeships only paid attention to the impact of the phenomenon of aging of society on the healthcare and the social security systems, the education system and the labour market as well as the necessity of adjusting the social infrastructure to the needs of the elderly. The diagnoses quote pessimistic indicators characterising the labour market, such as the low employment level, especially in the group of young people and people over 50, and long-term unemployment. Unfortunately, **the diagnosed problems were not reflected in the postulative part**

of the strategy. There are few regional development strategies where operational objectives are targeted directly at people aged 50+/45+ and relate to:

- economic activation of this group of people (Mazowieckie, Podkarpackie and Zachodniopomorskie Voivodeships),
- equalisation of opportunities related to access to the labour market (Małopolskie Voivodeship),
- assistance in starting economic activity (Śląskie Voivodeship).

The voivodeship development strategies and voivodeship employment strategies programmed very general measures in the regional labour markets. They were developed in Regional Action Plans for Employment, which mentioned people aged 50+/45+ as one of the priority groups of the unemployed.

### 3.4. Conclusions and recommendations

Analysis of the content of central and local government planning documents programming measures aimed at economic activation of people aged 50+/45+ led to the formulation of the following conclusions:

On the basis of reports on the implementation of measures programmed in the NAPE it is difficult to indicate amount spent on activation of people aged 50+. Reports on the accomplishment of plans present information on the implementation of measures targeted at different groups of beneficiaries, including e.g. people aged 50+. They rarely include detailed data referring to the effects of the activation of this group of the unemployed. It may result from the fact that many undertakings activating people aged 50+ are performed within the framework of implementation of a general line of action: activation of the unemployed in a particularly difficult situation in the labour market.

1. Analysis of the NAPEs revealed that measures in the area of active labour market policy implemented at the regional and local levels are general and universal in character and are usually targeted at all categories of the unemployed being in a particularly difficult situation in the labour market.

**It is recommended** to develop a package of activation instruments addressed to this particular group of the unemployed, i.e. people aged 50+/45+. Successful economic activation requires a more individual approach to this category of people.

2. Development of a set of instruments for economic activation of the unemployed aged 50+/45+ requires systematic, multi-faceted diagnoses and analyses of the situation of this category of the unemployed in the labour market in the individual regions, based on the multi-faceted diagnosis of the situation of people aged 50+ performed for the purposes of preparing the “Solidarity across generations” programme. Measures aiming at increasing the economic activity of people over 50” programme.

**It is recommended** that this diagnosis should encompass an analysis of both quantitative data (review of regional statistics) and qualitative data, reflecting opinions on conditions and tools for activating of people aged 50+/45+ communicated by these people, trade unions, employers and the public employment services. A good starting point may be the conclusions presented in the first chapter of this publication. Analysis and qualitative evaluation of the discussed conditions and tools (at the national level) will constitute the subject of the *Diagnosis of the Present Situation of Women and Men Aged 50+ in the Labour Market in Poland* planned within the framework of this project.

3. Effective implementation of the objectives of the labour market policy with regard to people aged 50+/45+ requires greater coordination and integration of measures at the state and local government levels. Special **attention should be paid** to the formal quality of the NAPE. These documents are very different in nature, which is partly attributable to the fact that no guidelines existed in relation to the method of their preparation. As a result, all interregional comparisons of the planned measures for activation of people aged 50+/45+ are difficult, if not downright impossible. Lack of uniformity of the programme provisions makes it difficult to monitor and coordinate the implemented measures at the country level. Preparation of guidelines according to which the NAPEs should be prepared could contribute to ensuring comparability of their provisions, clarity, efficient coordination and monitoring of measures undertaken by the VEOs for people aged 50+/45+.
4. The “Solidarity across generations. Measures aiming at increasing the economic activity of people over 50” programme is the first and so far the only programme which in a systemic and comprehensive way addressed the problems of economic activation of people over 50 in Poland. However, a review of Regional Action Plans for Employment for until 2009 reveals that it was not comprehensively implemented at the level of the regions. In order to increase the level of engagement of local governments in the implementation of the “Solidarity across generations” programme, **it is recommended** to above all offer information and promotion measures to the voivodeship and poviats employment offices related to the principles and objectives of this programme.



# Chapter 4

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## Civic Initiatives Fund and its role in equalisation of opportunities in the labour market to people aged 50+/45+

Introduction

4.1. Characteristics of the programme

4.2. Characteristics of beneficiaries in projects including people aged 50+/45+ in their target groups

4.3. SWOT analysis of projects

4.4. Conclusions and recommendations





## Introduction

The most important objective for establishing the Civic Initiatives Fund (CIF) is stimulating the creation and support of the development of civic initiatives with participation of the sector of non-governmental organisations. The CIF was prepared as a programme complementary to the already existing solutions and practices in this area; its contents adopt the perspective related to the creation of the Strategies for Supporting the Development of Civic Society.

This chapter presents the characteristics of this programme and selected projects financed from the CIF funds supporting equalising opportunities on the labour market for people aged 50+/45+. It was also attempted to perform a critical evaluation of the strong and weak aspects of the projects implemented in 2005–2009 as well as the opportunities and threats related to their implementation, from the point of view of improving the situation of people aged 50+ in the labour market. The final part presents the basis conclusions from the performed analysis and recommendations for policy.

### 4.1. Characteristics of the programme

Between 2005 and 2007, the Civic Initiatives Fund functioned as the Government Programme. In 2008 it was continued using financial aid from the specific purpose reserve of the state budget. Between 2009 and 2013, it functioned as the Civic Initiatives Fund Operational Programme for 2009–2013, constituting an undertaking complementary to the Human Capital Operational Programme for 2007–2013.

Between 2005 and 2007, the CIF had the total budget of 110 million PLN. The funds which were included in the CIF budget for 2008 amounted to 60 million PLN, and the amount planned for implementation of tasks in 2009 reached 62.75 million PLN.

The funds can be used by:

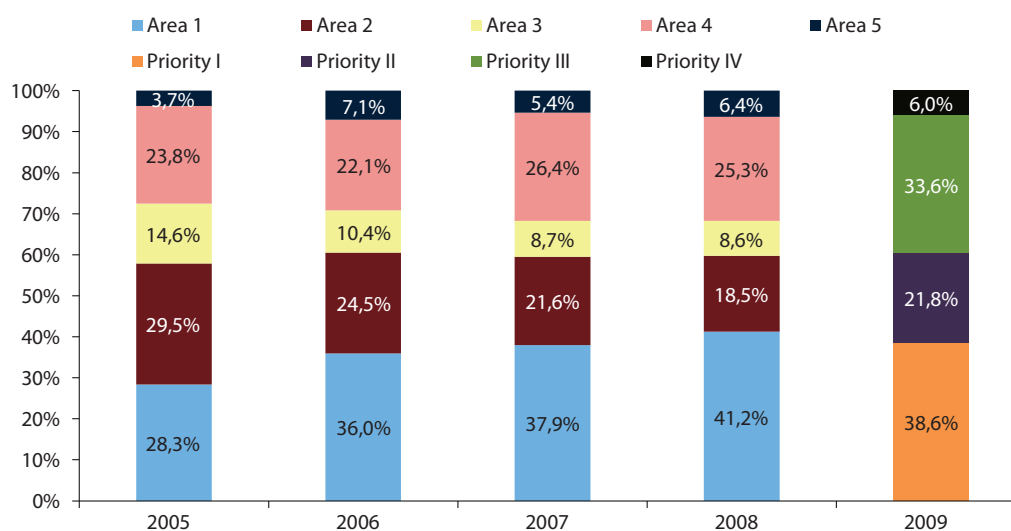
- non-governmental organisations,
- church legal persons and organisational units referred to in Article 3, paragraph 3, point 1 of the Act of 24 April 2003 on public benefit activity and voluntary work (*Dziennik Ustaw* of 2003 No. 96, item 873 as amended),
- social cooperatives referred to in the Act of 27 April 2006 on social cooperatives (*Dziennik Ustaw* of 2006 No. 94, item 651 as amended) — with regard to socially beneficial activity in the sphere of public services.

The group of beneficiaries exclude associations of local government units referred to in Article 3, paragraph 3, point 2 of the Act of 24 April 2003 on public benefit activity and voluntary work, and entities referred to in Article 3, paragraph 4 of the Act on public benefit activity and voluntary work, i.e. political parties, trade unions and employers' associations, professional associations, foundations founded solely by the State Treasury or a local government unit (subject to subpoints a, b and c of this article), and foundations created by political parties or sports clubs being commercial law companies.

One of the five areas of support indicated for the years 2005–2008 was social integration and activation enabling financing of projects encompassing e.g. employment promotion and economic activation of people without employment and at risk of losing their jobs (Area of support No. 2 within the CIF). Starting from 2009, the substantive scope of support has been prepared in the form of priorities. From among the four priorities, Priority III is dedicated e.g. to social integration and activation. However, it should be clearly indicated that the possibility of implementing projects involving people aged 50+/45+ existed also within other areas and priorities.

The distribution of financial resources within the CIF is accomplished by way of competition. Between 2005 and 2008, applicants could apply for a grant ranging from 5 thousand PLN to 250 thousand PLN, with the necessity of ensuring a direct contribution in the amount of at least 10% or at least 20%, depending on the amount of the grant applied for. In 2009, changes were introduced related to the amount of the grant, specifying the minimum amount of the grant as 10 thousand PLN and the maximum amount as 300 thousand PLN.

Analysis of the structure of projects financed from the Civic Initiatives Fund reveals a clear downward trend with regard to the possibility of financing objectives related to social integration and activation; this tendency appeared in 2005–2008, when the participation of projects from Area 2 targeted at social integration and activation was systematically decreasing — from 29.5% of the total funds allocated to financing projects in various areas of support in 2005 to 18.5% in 2008 (Fig. II.1.).



**Figure II.1.** Structure of projects co-financed from the CIF according to the area of support (2005–2008) and priority (2009)

Area 1 — Social security

Area 2 — Social integration and activation

Area 3 — Rights and freedoms of humans and citizens

Area 4 — Science, culture, schooling and education

Area 5 — Public safety and national defense

Priority I — Active and aware citizens, active local communities

Priority II — Efficient non-governmental organisations in a good state

Priority III — Social integration and activation. Social security

Priority IV — Development of social entrepreneurship

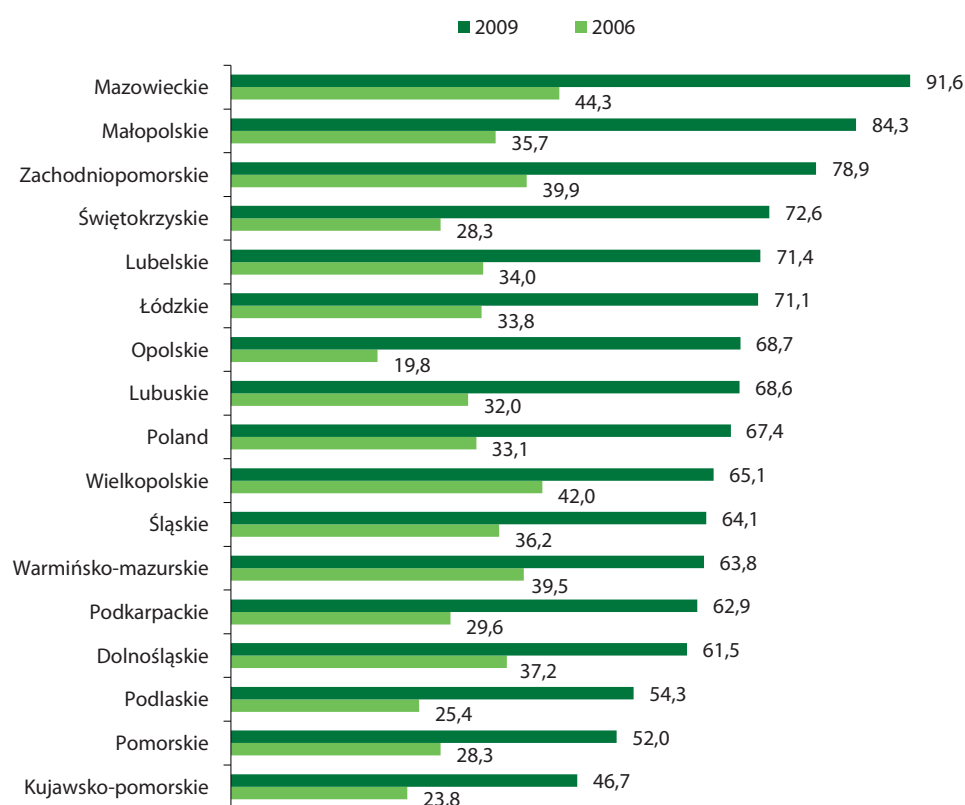
Source: Prepared by the author on the basis of data provided by the MLSP (2010).

In 2009, the negative tendency was to a great extent retained, despite increasing the participation of Priority III financing projects in the area of social integration and activation. It was in 2009 that the area of support was extended, now including measures related to social security; at the same time the number of the priorities was reduced to four.

The most active applicants seeking funds within the framework of the CIF were those from the Mazowieckie Voivodeship. Apart from 2006, when they submitted 26% of the total number of applications, in subsequent years their participation remained at the level of 20.4–21.0% of the total number of applications submitted in the whole country. This may suggest that in the initial period of the programme's functioning there was an information barrier, due to which information about competitions did not reach all the potentially interested entities; entities located closed to the source could more easily obtain the necessary information.

The group of voivodeships being leaders in the number of submitted applications included: Dolnośląskie, Małopolskie, Śląskie and Wielkopolskie Voivodeships, in which, however, the number of submitted applications was twice or even three times lower than in the Mazowieckie Voivodeship. In 2006–2009, the entities least active in submitting applications were in all the cases those from the Opolskie Voivodeship, whose participation oscillated from 0.8% in 2006 to 1.4% in 2009. This data illustrates an advantageous tendency of the gradual limiting of the disproportion between the most active and the least active regions of Poland with regard to applications for aid from the CIF.

The Mazowieckie Voivodeship consumed the greatest amount of funds from among all the voivodeships in Poland in the period between 2006 and 2009: from nearly 8 million PLN in 2006 to a bit over 15 millions PLN in 2008 and 2009; the least amount was consumed by the Opolskie Voivodeship, whose residents implemented projects with the total value from 138 thousand to 755 thousand PLN.



**Figure II.2.** The average value (in thousand PLN) of projects financed from the CIF according to the voivodeships in 2006 and 2009

Source: Prepared by the author on the basis of data provided by the MLSP (2010).

The Opolskie Voivodeship exhibited the greatest dynamics of the growth of projects co-financing, which increased by as much as 445% in the years 2006–2009. A strong dynamics of growth was also noted in the following voivodeships: Podlaskie (growth by 255% in the same periods) and Kujawsko-pomorskie (growth by 220%). It must be remembered, however, that all these voivodeships started at very low basic levels, having obtained in 2006 a low total amount of projects co-financing.

Between 2006 and 2009, the average value of projects financed from the CIF decidedly increased, in the case of some voivodeships even twice (cf. Fig. 2: II.2.). Clear differences between the individual voivodeships are also noticeable with this regard. Projects with the greatest average level of financing were submitted in 2009 by beneficiaries from the Mazowieckie Voivodeship (91.6 thousand PLN) and the Małopolskie Voivodeship (84.3 thousand PLN). Projects with

the lowest average grant, on the other hand, were implemented by beneficiaries from the Kujawsko-pomorskie Voivodeship (46.7 thousand PLN) and Pomorskie Voivodeship (52 thousand PLN).

In comparison with other aid programmes, projects submitted within the CIF were characterised with high application effectiveness indicators, ranging from 26% in 2007 to 43% in 2005, 2006 and 2008, which was probably a result of the relatively low competition in obtaining funds in that period.

Analysis of the application effectiveness indicators according to the region does not reveal any tendencies. Apart from the Podkarpackie Voivodeship, which was the only one to be twice at the top of the ranking of voivodeship with regard to application effectiveness (in 2007 and 2009), all the other voivodeships were among the best in the effectiveness ranking in one year only to be included in the group of 3–4 least effective voivodeships in this ranking in another year. This was the case in the following voivodeships: Dolnośląskie, Lubuskie, Łódzkie, Opolskie, Pomorskie, Warmińsko-mazurskie and Zachodniopomorskie.

## 4.2. Characteristics of beneficiaries in projects including people aged 50+/45+

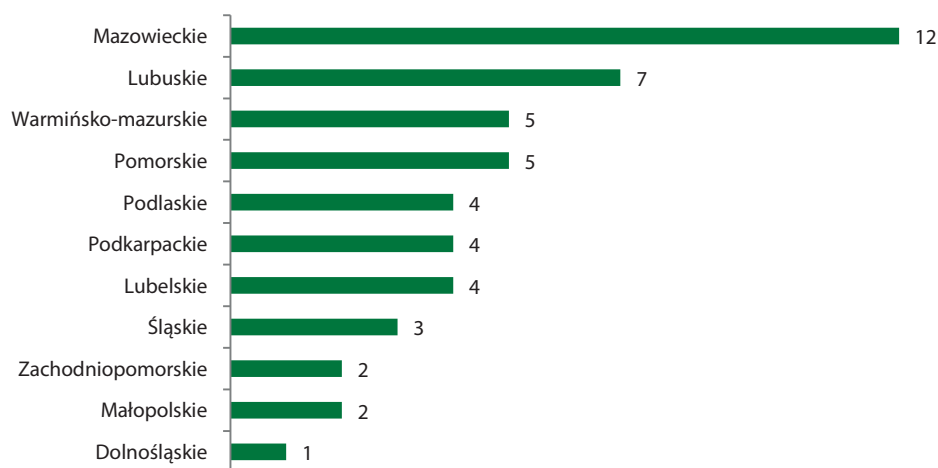
The research conducted in the period from September to December 2010, made it possible to identify the total number of 50 CIF projects engaging people aged 50+/45+ as one of their target groups of beneficiaries. Only four projects were identified which listed economic activation of people aged 50+/45+ and improving their position in the labour market as one of the specific objectives. 38 projects in which information was provided on the number of beneficiaries aged 50+/45+ had the total number of 6108 participants from this age group, which means that the average number of participants aged 50+/45+ for one project is 160.

Analysing target groups identified by the entities implementing the CIF projects involving people aged 50+/45+ one notices that the interventions are clearly targeted at people who are at least 50. Among all the identified projects, 30 projects chose people aged 50+ as their target group and another 18 projects included this age group as one of the target groups. **There was no identified project (!) targeted directly at people aged 45+ or at least listing this group as one of the target groups.**

The CIF projects fulfilling these conditions were implemented in 12 voivodeships. Most projects from this category were accomplished in the Mazowieckie Voivodeship (12), Lubuskie Voivodeship (7) as well as in the Warmińsko-mazurskie Voivodeship and Pomorskie Voivodeship (5 in each) — cf. Fig. II.3.

In the great majority of cases projects were implemented at the territory of the voivodeship in which the office of the entity implementing the project was located. Only four projects were completely implemented in a different voivodeship than the office of the entity implementing the project while the scope of two more projects encompassed also other voivodeships apart from the voivodeship of the entity implementing the project.

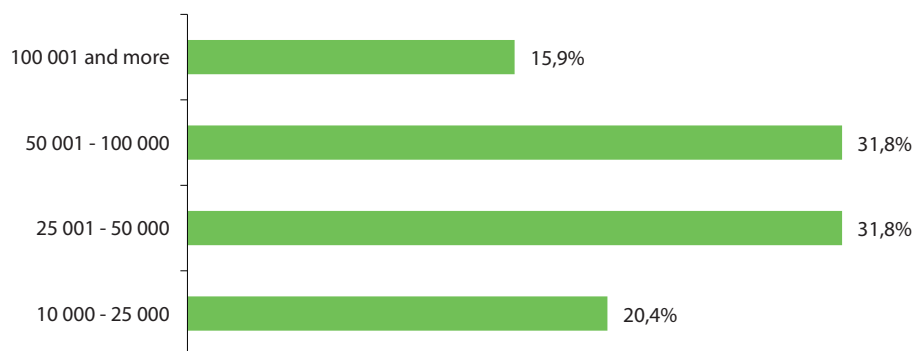
Special attention should be paid to the fact that considerable activity and effectiveness in obtaining funds was exhibited by institutions from voivodeships characterised by a relatively low level of economic development, including in particular those from the eastern voivodeships of Poland. It may be a concern, on the other hand, that there were few projects aimed at economic activation of people aged 50+/45+ financed from the funds of the CIF which were implemented in voivodeships with a high percentage of the unemployed from this age group in the total number of the unemployed. These voivodeships included: Dolnośląskie, Łódzkie, Zachodniopomorskie and Opolskie (cf. point 1.3. of this study). The only exception from this negative tendency was the Lubuskie Voivodeship, where as many as 7 projects from this category were implemented.



**Figure II.3.** Structure of the CIF projects involving people aged 50+/45+ with regard to equalisation of opportunities in the labour market implemented in 2005–2009 according to the voivodeships

**Source:** Prepared by the author on the basis of the CIF projects base and a preliminary Internet research performed from September to December 2010.

The average value of a project involving people aged 50+/45+ was 59.6 thousand PLN, with the median reaching the value of 49.1 thousand PLN<sup>38</sup>. Nearly every third project had the value between 25 thousand to 50 thousand PLN or between 50 to 100 thousand PLN, while every fifth one — the value not exceeding 25 thousand PLN (cf. Fig. II.4.). Two considerable projects with the value over 100 thousand PLN constituted 15.9% of the total number of the implemented projects.

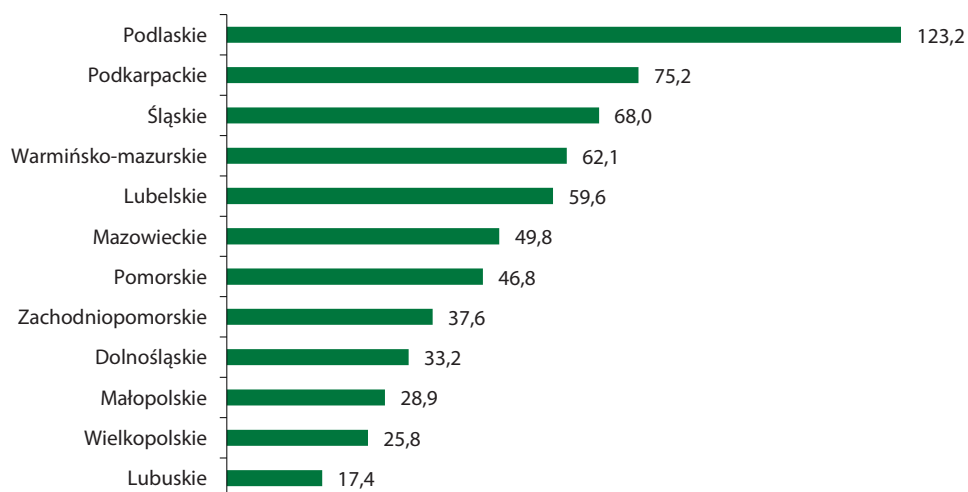


**Figure II.4.** Structure of the CIF projects involving people aged 50+/45+ with regard to equalisation of opportunities in the labour market implemented in 2005–2009 according to the project value expressed in PLN

**Source:** as for Fig. II.3.

Strong regional differences are visible regarding the average value of the projects (cf. Fig. II.5). The projects with the greatest value were implemented in the eastern Poland voivodeships, in particular in the following voivodeships: Podlaskie, Podkarpackie and Lublin (cf. Fig. II.5).

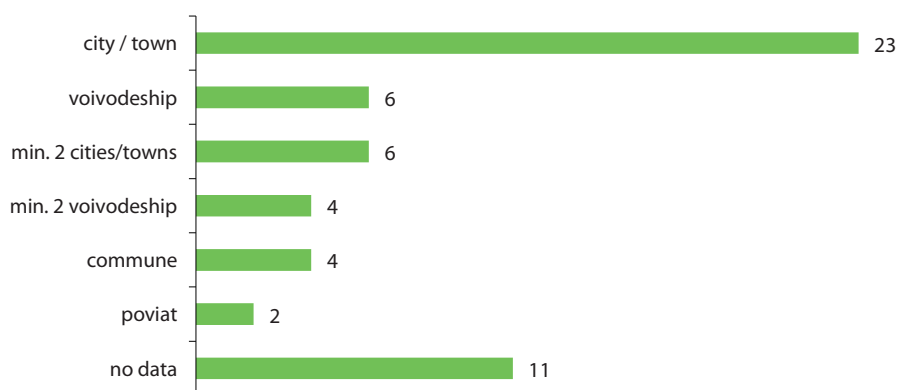
<sup>38</sup> This means that the value of half of the projects did not exceed 49.1 thousand zlotys.



**Figure II.5.** Average value of the CIF projects (in thousand PLN) involving people aged 50+/45+ with regard to equalisation of opportunities in the labour market implemented in 2005–2009 according to the voivodeships

Source: as for Fig. II.3.

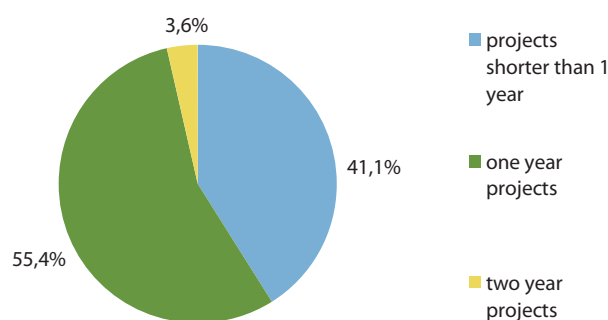
Among projects targeted at people aged 50+/45+, which were to improve their opportunities in the labour market, the dominating projects included those targeted at local communities inhabiting one defined geographical area. Most often, the scope of the projects encompassed inhabitants of a given city/town (21 projects), more rarely — of a given voivodeship (6 projects), commune (4 projects) or powiat (2 projects). 9 projects were implemented in an area of at least two cities/towns or voivodeships (cf. Fig. II.6.).



**Figure II.6.** Structure of the CIF projects involving people aged 50+/45+ with regard to equalisation of opportunities in the labour market implemented in 2005–2009 according to the intervention area

Source: as for Fig. II.3.

A bit more than half of the CIF projects aimed at Equalising Opportunities on the Labour Market for People Aged 50+/45+ were yearly projects with the average value of 55.1 thousand PLN. Considering the duration of projects, projects which lasted less than a year also had a considerable participation within the projects structure. However, shorter duration of these projects was related to greater intensity of the undertaken measures, which is seen in the higher average value of these projects at the level of 65.3 thousand PLN (cf. Fig. II.7.).



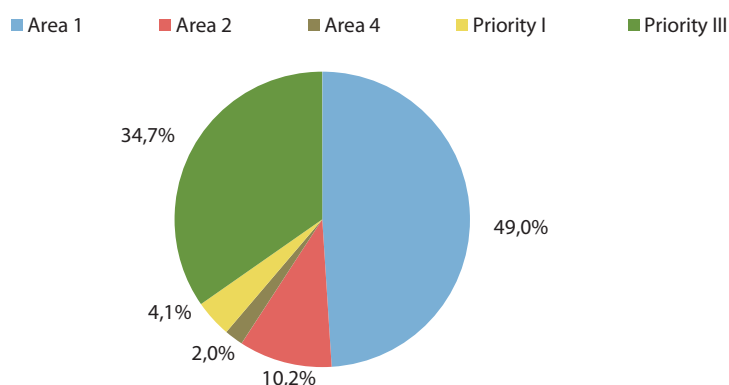
**Figure II.7.** Structure of the CIF projects involving people aged 50+/45+ with regard to equalisation of opportunities in the labour market implemented in 2005–2009 according to project duration

Source: as for Fig. II.3.

**Support targeted at people aged 50+/45+ was mainly related to implementation of measures related to social activation of this group (interventions within the scope of Area 1), and not improvement of their situation in the labour market (interventions within the scope of Area 2) — cf. Fig. II.8.** This situation could be a result of the clear domination of institutions focusing on supporting social activation among the entities implementing the projects. Moreover, the measures related to social activation of the elderly were more strongly supported from the financial point of view, as the average value of projects implemented in this area amounted to approximately 60 thousand PLN, while the average expenses for economic activation projects encompassing measures related to equalisation of opportunities of this group age in the labour market amounted to approximately 40 thousand PLN.

The above observations present the main direction of the interventions within the CIF programme with regard to support for people aged 50+/45+. Intervention concerning this group of people is relatively rarely capable of maintaining their activity in the labour market; it more often encompasses measures preparing this age group for passing into the stage of economic inactivity.

Thus, the presented data clearly indicate the need for stimulating and supporting economic activity of people aged 50+/45+, whose coverage by the CIF programme in its current form was largely unsatisfactory.



**Figure II.8.** Structure of the CIF projects involving people aged 50+/45+ with regard to equalisation of opportunities in the labour market implemented in 2005–2009 according to the intervention area/priority

Source: as for Fig. II.3.

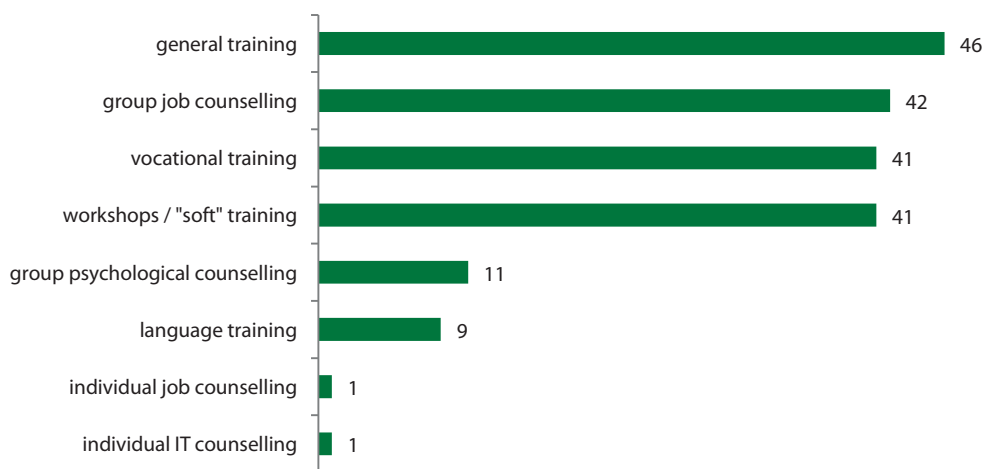
Projects were most often implemented individually, with only 8 projects (16%) implemented in a partnership. Although the entities implementing the projects sometimes made unrealistic assumptions related e.g. with timelines for accomplishment of measures, it should be clearly underlined that the great majority of the implemented projects accomplished the envisaged results

expressed using various indicators. The projects' results were most often expressed as a number of trained people, number of training hours, number of people who obtained a certificate confirming the newly learned skills. In a few cases only, the number of people who gained concrete skills useful in the labour market, e.g. computer skills, was indicated.

The objectives of the analysed projects financed from the CIF funds in 2005–2009 were most often formulated as the generally understood social activation and encompassed: stimulating social activity, learning the basics of healthy nutrition, physical movement activation, improvement of the quality of life of the elderly, use of their free time or increasing the social awareness concerning the role and place of the elderly in society. A small number of projects directly formulated objectives the attainment of which can directly lead to increasing the opportunities of people aged 50+/45+ in the labour market, e.g. ensuring conditions for professional development of people at a pre-retirement age.

The objectives of numerous projects financed from the CIF funds in the analysed period envisaged integration of local communities inhabiting the areas in which the projects were implemented. Analysis of measures undertaken within the projects makes it possible to treat as highly probable that the objectives related to integration have been accomplished (although there is no information from evaluative measures). Projects of this type envisaged cooperation of numerous entities (apart from the entities implementing the projects and their beneficiaries also e.g. professional organisations or local governments) at numerous levels of the projects' implementation (e.g. recruitment, dissemination of results, etc.).

One of the objectives included in numerous CIF projects was intergenerational integration between the participants. As in the case of integration of local communities, in the light of the performed analysis of the projects it seems highly probable that an agreement between people representing different generations expressed as their cooperation was accomplished.



**Figure II.9.** Type of training and counseling measures undertaken within the CIF projects involving people aged 50+/45+ implemented in 2005–2009

Source: as for Fig. II.3.

The implemented projects most often offered general training (46 projects, which constituted 92% of the total number of projects), group job counseling (42 projects, 84% of the total number of projects), workshops/"soft" training and vocational training (41 projects in each category, 82% of the total number of projects) (cf. Fig. II.9). More rarely, different forms of support were used, such as group psychological counseling (11 projects, 22% of the total number of projects) or language training (9 projects, 18% of the total number of projects). In the case of projects aimed at equalisation of opportunities of the elderly in the labour market the focus on measures related to counteracting digital exclusion is well noticeable. In relation to the above, basic computer courses were offered. Typically, support was characterised by standardisation and



a low degree of customisation, which is why there were limited possibilities of solving diversified problems encountered by people aged 50+/45+ in the labour market.

### 4.3. SWOT analysis of projects

On the basis of project summaries created at the stage of analysis of all the CIF projects involving people aged 50+/45+, a SWOT (projects' strengths, weaknesses, opportunities and threats) analysis was prepared, presented in Table II.7. The necessity of analysing all the projects was a result of their small number (only four) which listed economic activation of people aged 50+/45+ and improving their position in the labour market as one of the specific objectives.

**Table II.7.** SWOT analysis of projects involving people aged 50+/45+ financed from the Civic Initiatives Fund

Strengths	Weaknesses
<ol style="list-style-type: none"> <li>1. Accomplishment of the great majority of objectives set out in the projects, which should encourage other entities potentially interested in implementing projects to submit applications in subsequent calls for proposals.</li> <li>2. Considerable interest of potential beneficiaries in participating in projects, which confirms a real need of support and decreased the risk of failure of project implementation as a result of recruitment problems.</li> <li>3. Integration of local communities through cooperation of implementing entities and beneficiaries for project accomplishment and creation and reinforcement of interpersonal bonds between the project participants.</li> <li>4. Successful intergenerational integration between participants of projects, indicating that there is no psychological or generational gap related to lack of mutual acceptance between the elderly and the youth.</li> </ol>	<ol style="list-style-type: none"> <li>1. The majority of projects focusing mainly on social activation of the elderly and not economic activation.</li> <li>2. Relatively low value of projects targeted at equalisation of opportunities in the labour market (in comparison with projects aimed at support of social activation).</li> <li>3. In the case of projects aimed at equalisation of opportunities of the elderly in the labour market, focus on measures related to counteracting digital exclusion and limiting the project to organisation of basic computer courses with exclusion of other areas of knowledge and competences useful in the labour market.</li> <li>4. Breaking measures undertaken within individual projects into different activities, often poorly related with one another.</li> <li>5. Domination of projects targeted exclusively or mainly at people over 60, while disregarding people aged 45–50 as potential beneficiaries.</li> <li>6. Little experience of the implementing entities in project planning and management resulting adoption of unrealistic assumptions concerning e.g. timelines for accomplishment of measures.</li> <li>7. Domination among the implementing entities of institutions oriented to support of social activation and not economic activation.</li> </ol>
Opportunities	Threats
<ol style="list-style-type: none"> <li>1. Broader use of the CIF financial resources as an instrument of activation of the unemployed aged 50+/45+, especially in voivodeships with a high percentage of the unemployed from this age group in the total number of the unemployed</li> <li>2. Clear distinguishing of the 45–50 age group (now completely disregarded) as a subject of the programme's interventions, which will make it possible to focus part of support on this group.</li> <li>3. Broader inclusion of employers in the process of economic activation of people aged 50+/45+, which will make it possible to adjust the training and counseling offer to the needs of the local labour market and increase the these people's chances of finding jobs (an ideal solution seems to be the "patronage" system, in which a group of people improves its competences within the scope specified by the future employer).</li> <li>4. Possibility of using the knowledge gained by the beneficiaries for further self-study.</li> </ol>	<ol style="list-style-type: none"> <li>1. Maintaining the present structure of the programme, which results in concentration of support for objectives related to social activation of the elderly aged 60+, and not their economic activation.</li> <li>2. Risk of a failure in implementation of projects targeted at economic activation of beneficiaries by institutions which do not have experience in this area.</li> <li>3. Implementation of economic activation projects not corresponding to the real needs of the local labour markets.</li> </ol>

Source: Prepared by the author on the basis of projects summaries.

## 4.4. Conclusions and recommendations

The performed analysis can lead to the following conclusions and recommendations for the support policy:

1. People aged 50+/45+ are, within the framework of social policy objectives implemented through the CIF programme, treated as a rather unpromising group from the point of view of economic activity which is confirmed by the decreasing tendency related to the relative participation of financial resources allocated to implementation of social integration and activation objectives.

**It is recommended** to clearly divide, at the programme level, the objectives (and the financial resources allocated to them) related to economic activation from those related to social security, which orientates support targeted at the elderly to equalisation of opportunities for this group in the labour market.

2. The inadequate approach to stimulating and supporting economic activity of people aged 50+/45+ is influenced by the fact of combining within one priority of the CIF (Priority III) of interventions included in two areas delineated earlier, i.e. the area of professional integration and activation and the area of social security, which means that the objective related to equalisation of opportunities in the labour market ceases to be emphasised and becomes blurred.

**It is recommended** to identify objectives related to economic activation of people aged 50+/45+, which will ensure an appropriate marketing message emphasising the need for supporting this group of people and a tendency towards including this group in projects implementation.

3. The perception of social policy is also transferred to the sphere of activity of the “third sector” with regard to obtaining funds for support projects within the CIF programme, which is confirmed by the little participation of intervention measures targeted at people aged 50+/45+ aimed at equalisation of their opportunities in the labour market. In the organisation of support for this group in the local labour markets dominates the protective aspect, and not the activating aspect. **In the present form, the CIF does not satisfactorily perform the role of motivating people aged 50+/45+ to become active in the labour market.** This concerns above all the voivodeships with a high percentage of the unemployed aged 50+/45+ in the total number of the unemployed, i.e. the Dolnośląskie Voivodeship, Łódzkie Voivodeship, Zachodniopomorskie Voivodeship and Opolskie Voivodeship.

4. People aged 50+ are most often treated by the CIF implementers as people **to soon pass into the state of economic inactivity**, for whom the best aid is adequate preparation for the new role of pensioners. These people are rarely supported in a way stimulating their further activity in the labour market.

**It is recommended** to launch mechanism stimulating or even forcing CIF projects implementers to include broader objectives and measures related to economic activation of the elderly (e.g. allocating greater funds to projects activating people aged 50+/45+, appropriately set criteria for projects selection).

5. The implemented support projects are rarely customised to the diagnosed needs of people aged 50+/45+; most often, they are standardised and could well be targeted at any other age group. Computer skills dominate among the competences practised as part of project implementation. Insufficient practice of other skills useful in the labour market to this age group is clearly visible, especially with regard to “soft” competences such as: ability to cope in stressful situations, ability to cope with failures, openness to changes, etc.

**It is recommended** to complement the training courses offered, and especially to include to a greater extent programmes developing “soft” competences.

6. The value of any of the projects implemented so far did not exceed 150 thousand PLN, which would require the CIF project implementer to ensure a greater direct contribution (a direct contribution in the amount of 20% as compared with a direct contribution in the amount of

10% in the case of projects whose value does not exceed 150 thousand PLN); this data clearly suggest financial weakness of the potential applicants.

**It is recommended** to consider lowering the amount of direct contribution to the linear level of 10%.

7. In the first period of functioning of the CIF programme, a barrier in unequal access to information was revealed among all the institutions which are potentially capable of applying for funds for implementation of submitted projects. For this reason, information on competitions did not reach all the entities which are potentially interested in participating.

**It is recommended** to pay special attention to ensuring equal access to information while programming support of this kind in future periods.



# Chapter 5

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## Role of the European Union aid funds for 2004–2006 in economic activation of people aged 50+/45+ in Poland

### Introduction

- 5.1. Analysis of support for equalisation of opportunities for people aged 50+/45+ within the Phare programme
- 5.2. Analysis of support for equalisation of opportunities for people aged 50+/45+ within the Sectoral Operational Programme Human Resources Development
- 5.3. Analysis of support for equalisation of opportunities for people aged 50+/45+ within the Integrated Regional Operational Programme
- 5.4. Analysis of support for equalisation of opportunities for people aged 50+/45+ within the EQUAL Community Initiative Programme
- 5.5. Conclusions and recommendations



## Introduction

The aim of this chapter is to analyse and evaluate projects targeted at equalisation of opportunities for people aged 50+/45+ in the Polish labour market financed from the ESF funds **in the financial perspective 2004–2006** (including projects financed in this period from pre-accession funds). The performed analysis makes it possible to assess the scale of measures targeted at people aged 50+/45+ within four programmes: the Sectoral Operational Programme Human Resources Development (SOP HRD), Integrated Regional Operational Programme (IROP), EQUAL Community Initiative Programme (EQUAL CIP) and Phare. These programmes projected, in the period indicated above, measures targeted at development of human resources, and therefore it is possible to look for solutions favouring equalising opportunities on the labour market for people aged 50+/45+ in Poland only in this area.

In this chapter: (i) possibilities of financing initiatives targeted at economic activation of people aged 50+/45+ are indicated, (ii) projects addressed to people aged 50+/45+ are characterised, (iii) initiatives undertaken in the 2004–2006 perspective are evaluated.

The analysis was performed in the period from September to December 2010 on the basis of the available sources of information, including projects bases, catalogues of good practices, Internet resources and documentation of projects implemented using EU funds for 2004–2006<sup>39</sup>.

### 5.1. Analysis of support for equalisation of opportunities for people aged 50+/45+ within the Phare programme

Within the numerous editions of the Phare Programme — Economic and Social Cohesion, Human Resources Development (Phare ESC HRD 2000–2003), encompassing the years 2000–2006, measures were undertaken aimed at improving the quality of both human resources and national and regional structures responsible for employment. Projects implemented within the Phare ESC HRD programmes were mainly related to training activities targeted at the unemployed and people encountering difficulties in the labour market as well as employees and employers in the SME sector. Within the Phare 2000 and 2002, people aged 50+ were involved only in a few projects (it was possible to identify two initiatives, which, however, involved mainly people at a pre-retirement age).

From the point of view of equalisation of opportunities for people aged 50+ in the labour market, a special role was performed by the **Phare 2003 National Human Resources Development Plan (NHRDP) programme “Support of employment of people over fifty”**. The Polish Agency for Enterprise Development (PAED), responsible for implementation of the programme, announced two competitions (in September and October 2005). Unlike in the earlier editions of Phare, support encompassed all the voivodeships.

Phare 2003 NHRDP. “Support of employment of people over fifty” was the first programme in Poland for equalisation of opportunities for people at an immobile age to have such a large scale.

The aim of the **Phare 2003 NHRDP “Support of employment of people over fifty”** was to maintain economic activity of people over 50 wishing to change or improve their situation in the

<sup>39</sup> The analysis covered projects accomplished a few years ago, which made the research more difficult and had an influence on the thoroughness of the performed analyses.

labour market through receiving support for starting their own businesses. The target group for the undertaken measures were people aged 50+ (unemployed and seeking employment, but not receiving pension benefits). Support encompassed approximately 1700 people, of whom 348 set up their own businesses (cf. Table II.3 of this report and NAPE 2006, p. 50).

The programme's budget amounted to 18,415 thousand PLN (NAPE 2006, p. 76), which means that an average amount spent on one participant was approximately 24.5 thousand PLN. In 2006, 13,901 thousand PLN were spent to this aim (*Report... 2007*, p. 11). In 2005, agreements concerning implementation of 29 out of 38 submitted projects were signed within the programme (Bełdowska et al. 2005). The value of the signed agreements reached (according to PAED data) EUR 2,434,021.16 ([http://archiwum.parp.gov.pl/dotPhare3rzl\\_ngos50.html](http://archiwum.parp.gov.pl/dotPhare3rzl_ngos50.html)). The average value of a project amounted to approximately 159 thousand EUR. Projects were implemented between 25 November 2005 and 30 September 2006.

Measures of the programme encompassed:

- coaching and counseling related to setting up businesses,
- psychological counseling (workshops, individual and group counseling),
- training related to starting economic activity, including foreign language and computer courses,
- one-off support for setting up businesses (equivalent of 10 thousand EUR<sup>40</sup>), bridging support.

Projects were addressed to beneficiaries inhabiting a rather small territory, most often a poviát, commune or a number of communes, rarely the whole voivodeship. Among undertakings with a larger scale one can mention the "Entrepreneurship academy 50+", implemented in the Dolnośląskie, Świętokrzyskie, Pomorskie and Warmińsko-mazurskie by the Democratic Women's Union. An added value of the project was the development of solutions regarding support for older participants in the labour market, including:

- support groups, Entrepreneurs' Club 50+ (PEO in Bolesławiec),
- integration centre, in which all the beneficiaries participated (Kielce),
- social cooperatives (Skarżysko Kamienna, Olsztynek) — a social cooperative was established in Olsztynek, the social cooperative model was promoted in other areas of the country.

From the point of view of the number of ultimate beneficiaries, the majority of projects implemented within the Phare programme were small, addressed to several or several dozens of people; this was a result of the special character of the programme, which envisaged grants for new businesses created by beneficiaries aged 50+. Depending on the specified needs of the regional or local labour markets, the projects were targeted exclusively at women (e.g. "Top 50: talents discovered over 50", "Not only grannies"), although in the majority of cases the only (apart from access conditions) criterion for selecting participants was their inhabiting a given territory.

An advantage of the undertaken measures was specifying, for the first time in such a scale, support for people aged 50+. Experiences from the projects implementation prove that people aged 50+ are ready for changes, but need help to introduce them. The most important factors for them are motivation, an impulse to act, contact with other people in a similar situation, but also financial aid (in this case in the form of a grant to start their own businesses).

It is worth underlining that the implementation of Phare 2003 projects often prepared the basis for cooperation between many non-governmental organisations (many projects' implementers) with the poviát employment offices, which actively participated in the promotion of the projects among the unemployed aged 50+, increasing the chances of effective recruitment. The undertaken cooperation was in many cases formalised, which contributed to better application of the lessons learned in cooperation with the beneficiaries aged 50 and older.

A disadvantage of the discussed Phare 2003 programme may be insufficient promotion of the projects' results. At present it is difficult to obtain information on these projects. The developed solutions were usually not published in the form of reports or data bases, and even if such data

<sup>40</sup> It was possible to grant aid in a lower amount (e.g. to a larger than initially envisaged group of beneficiaries), with PAED's consent.



bases existed they are unavailable now. An example is the “Golden Age Atlas” project, which involved creation of the now unavailable data base entitled the Internet Base of Senior Initiatives ([www.atlas.ngo.pl](http://www.atlas.ngo.pl))<sup>41</sup>.

Due to the broad scope of support, one should also underline the measures undertaken within the “50PlusIsGood” PAED project implemented between October 2005 and September 2006. As part of this project, measures were undertaken aimed at increasing awareness and changing attitudes of company managers regarding the perception of employees aged 50+. The project also involved large-scale training support for people aged 50+ in the area of information technologies and language training in the context of professional requirements. A distinctive feature of the training was its specialisation — apart from the basic modules, the participants could further develop their language, IT and professional competences at specialist courses targeted at the needs of specific professional groups. The training and counseling support encompassed 3697 people. The implementation of the project cost approximately 28.2 million PLN (cf. Table II.3 of this report). **The lessons learned of the project are now continued by PAED** in the “Age is an advantage — training for entrepreneurs” project, financed from the funds of the Human Capital Operational Programme. As part of the project, standards of age management in companies were developed and in the first half of 2011 training sessions for managers and employees of human resources departments were launched in the area of practical age management skills<sup>42</sup>.

## 5.2. Analysis of support for equalisation of opportunities for people aged 50+/45+ within the Sectoral Operational Programme Human Resources Development

Support within the framework of the Sectoral Operational Programme Human Resources Development (SOP HRD) concerned implementation of projects improving development of human resources, increasing the ability of obtaining and maintaining employment, promoting entrepreneurship and equal opportunities in the labour market.

The aim of the programme was the creation of an open, knowledge-based society through creating conditions for human resource development through education, training and employment. The specific objectives were: (i) improving employability through the enhancement of the quality of the human resources and promoting entrepreneurial attitudes, (ii) — raising the educational attainment of Polish society, (iii) improving adaptability of business and their employees to the changing market conditions, (iv) strengthening of the equal opportunities policy in the labour market, including gender equality. **The implementation of the last of these specific objectives could therefore also refer to people aged 50+ or 45+.** Measures aimed at equalisation of opportunities for people aged 50+ or 45+ **could be** financed especially within **Measures 1.3., 1.5. and 1.6.**

The objective of **Measure 1.3. Counteracting and combating long-term unemployment** was to limit the phenomenon of long-term unemployment and its causes through supporting

<sup>41</sup> These initiatives were not, however, directly related to the subject of economic activity of people aged 50+/45+, but rather general activation of seniors (people over 65). Attention should be paid, nevertheless, to proposed solutions regarding intergenerational transfer of knowledge which favours overcoming stereotypes concerning older employees.

<sup>42</sup> The results of these activities are available e.g. on the following website: <http://www.parp.gov.pl/index/more/14838> (cf. Litwiński, Sztanderska 2010; Kwiatkiewicz 2010; Sergiejuk, Gajderowicz, Sztanderska 2010; Litwiński 2010). Age management is now an object of interest of not only public institutions, non-governmental organisations and employers but also the academic milieu. As examples, we can mention the activities of the Academy for the Development of Philanthropy or the measures undertaken by the institutions of the labour market in the Małopolskie, Pomorskie, Łódzkie, Opolskie or Kujawsko-pomorskie Voivodships referred to in Chapter 3. However, these issues are not within the scope of analysis of this study. They will be discussed in more detail in other research components of the *Equalising Opportunities on the Labour Market for People Aged 50+* project.

the unemployed and long-term unemployed in the area of professional reintegration. Measures preventing their elimination from the labour market and supporting the social environment of these people were emphasised. Both within model a) *Support for the unemployed, including the long-term unemployed*, as model b) *Support for the social environment of the unemployed*, **all the unemployed over 25** (except for university graduates) were offered active forms of counteracting unemployment before the end of the 12th month or in the period from 12 to 24 months from registering in the Employment Office (SOP HRD 2004, p. 91–92).

The objective of **Measure 1.5. Promotion of active social policy in support of high risk groups** was to limit the phenomenon of social marginalisation and to prepare people at risk of social exclusion to enter into the labour market, maintain employment or return to active professional life. One of the target groups for model a) *Support for people from groups at risk of social exclusion* were people using welfare benefits for long periods, including those unemployed for more than 24 months, and in the case of Social Integration Centres — more than 36 months (SOP HRD 2004, p. 94–96).

**The objective of Measure 1.6. Vocational integration and re-integration of women** was to offer comprehensive support in the labour market to women through promotion of equal access to employment for both genders, promotion of lifelong learning, measures for increasing employability and propagating flexible forms of employment which make it possible to reconcile professional life with family life. The target group was the following categories of women: (i) unemployed and seeking employment, (ii) economically inactive, (iii) with low or obsolete qualifications, (iv) returning to the labour market after a long period of inactivity, (v) from rural areas and (vi) conducting their own businesses or wishing to set up a business (SOP HRD 2004, p. 96–98).

As part of the SOP HRD, projects could be addressed to the target group of people aged 50+ or 45+ (there were no restrictions or preferences with this regard). The list of monitored indicators did not include the number of people aged 50+ or 45+.

According to the SOP HRD, the Programme's allocation amounted to 1,960,110,929 EUR. For Priority 1. **Active labour market and professional and social inclusion policy** the total amount of 946,062,544 EUR was spent, of which on Measure 1.3. — 29% of the total allocated funds, on Measure 1.5. — 11%, and on Measure 1.6. — 9%. However, it is difficult to estimate the amount allocated to the SOP HRD measures addressed to people aged 50+ or 45+.

At the stage of research on projects aimed at equalisation of opportunities of people aged 50+/45+ it was possible to verify only a small number of projects implemented within the SOP HRD. The information obtained from the VEOs suggest that **as part of Measure 1.3. there were no projects addressed exclusively or more strongly to people aged 50+/45+**. As far as the country level is concerned, a review of the projects bases made it possible to identify a small number (**only eight**) of projects addressed to people aged 50+/45+. **The projects were implemented above all as part of Measures 1.5 and 1.6.** The projects implemented within the SOP HRD identified at the present stage of research are listed in Table II.8.

**Table II.8.** List of projects aimed at equalisation of opportunities of people at an immobile productive age in the labour market in Poland implemented with the funds of the SOP HRD

No.	Project title	Beneficiaries	Project type
1	Labour market and the unemployed 50+ — barriers and opportunities	The Academy for the Development of Philanthropy in Poland, Warszawa	research
2	Looking for a 45-years-old: diligent, involved, experiences	Women, Family and Discrimination Counteracting Department of the MLSP, Warszawa	information and promotion
3	Active in the autumn of life 2006	Powiat Employment Office in Toruń	training
4	Hey, 40-years-olds! You can life differently!	Powiat Employment Office in Wadowice	training
5	OPPORTUNITY — preparing unemployed women (50+) for providing carer services	Polish Social Welfare Committee, Warszawa	training
6	Roadmap to employment	Fuga Mundi Foundation	training
7	Steel Magnolias from Stalowa Wola	Stalowa Wola powiat	training
8	Preparing unemployed women from Toruń for returning to the labour market	Municipal Family Assistance Centre in Toruń	training

**Source:** Prepared by the author on the basis of: *Review of Non-Governmental Organisations and Entrepreneurs Projects Recommended for Financing from European Social Fund*, Ministry of Regional Development, Warszawa 2006, *Review of Social Welfare Centres Projects Recommended for Financing from European Social Fund*, Ministry of Regional Development, Warszawa 2006, *Review of Public Employment Institutions Projects Recommended for Financing from European Social Fund*, Ministry of Regional Development, Warszawa 2006, *Good Practices. Description of Chosen Projects of Activities 1.1, 1.5 and 1.6 of Sectoral Operational Programme for Human Resources Development 2004–2006* (part 1 and 2), Centre for Human Resources Development, Warszawa 2010, EU grants map (<http://www.mapadotacji.gov.pl>), regional bases of SOP HRD projects, preliminary Internet research (September — December 2010).

All of these projects were implemented in compliance with the procedure set in the competition, they were not supranational and people aged 45+ or 50+ constituted at least one half of the beneficiaries.

Three of the listed projects covered the whole territory of Poland, while the others concentrated on the needs of the local labour market. It is worth underlining that only three projects were implemented by institutions of the third sector. The Academy for the Development of Philanthropy in Poland with its office in Warszawa was once again among the beneficiaries. The Academy for the Development of Philanthropy, from the beginnings of its operation (since 1998) has been focusing on economic activation of the elderly and its activities can certainly be pointed out as an example of good practices with regard to **promotion of equal opportunities for the elderly in the labour market**, including in particular **building the awareness concerning this problem**.

The results obtained in the “Labour market and the unemployed 50+ — barriers and opportunities” project are also worthy of underlining. The project was an in-depth study on the situation of the unemployed aged 50+ in the Polish labour market. The result of the project was a publication, under the same title, which presents the results of research conducted among the long-term unemployed over 50 and the entities representing private enterprises, public institutions, PEOs, VEOs, employment agencies and non-profit organisations as well as the government administration and non-governmental organisations. The conducted research was comprehensive and contributed to the commencement of a **broader debate on providing equal opportunities to women and men at a pre-retirement age**. Attention, especially that of the employers, was also drawn to the benefits related to employing people 50+/45+ (including women). The last of the mentioned results can also be attributed to the “Looking for a 45-years-old: diligent, involved, experiences” project<sup>43</sup>.

Training projects were addressed to the inhabitants of specific poviats or voivodeships. Their duration oscillated between 10 and 14 months. The beneficiaries of the training projects listed in

<sup>43</sup> In the present programming period, 2007–2013, research and diagnostic activities related to the problem of economic activity of people aged 50+ are undertaken with more frequency and their source of financing is in the majority of cases the European Social Fund.

Table II.8 were the unemployed. They could use the counseling services of a vocational counsellor, an employment agent and a psychologist, which made it possible to identify the correct path of further professional development. As a result of the undertaken diagnosis, the unemployed were **individually** sent to vocational training sessions, which in many cases involved computer skills (e.g. computer accounting, cost estimating using computers) or foreign language training (e.g. an English-speaking carer of the elderly). Another form of support were activation activities. The projects implemented by the PEOs were targeted at the long-term unemployed. Apart from the measures indicated above, they also included vocational training for some of the beneficiaries. In the case of the PEO-implemented projects under consideration, one should note the high employment rate among the beneficiaries. Many beneficiaries also got involved in voluntary work.

The implementers of the SOP HRD projects addressed to women aged 50+/45+ indicated that one of the problems was the stereotypical perception of the role of a woman in society, mainly as a mother and wife, which in the case of some female participants resulted in their abandonment of the project. Information and promotion activities which could contribute to bringing about a change in the perception of women are now undertaken within campaigns promoting equality of opportunities for both genders — their first effects are already noticeable (cf. Cieżka, Sochańska-Kawiecka 2007, p. 106–128).

Apart from increasing the competences of the ultimate beneficiaries, the “soft” advantages of the projects should be emphasised. Due to participation in the projects people being at a late stage of their careers and often at the end of their professional life managed to increase their self-esteem, improved interpersonal communication and team work skills, learned the principles of auto presentation and preparation of application documents as well as techniques of active job seeking. In a few words, they managed to overcome their passivity. It can therefore be concluded that **the projects favoured, in a broad perspective, equalisation of opportunities in the labour market to people at an immobile age.**

### 5.3. Analysis of support for equalisation of opportunities for people aged 50+/45+ within the Integrated Regional Operational Programme

The aim of the Integrated Regional Operational Programme (IROP) was to create conditions for increasing competitiveness of the regions and counteracting marginalisation of some areas in a way favouring long-term economic growth of the country, its economic, social and territorial cohesion and integration with the European Union. The funds from the ESF were used to financed measures within **Priority 2. Strengthening the human resources development in regions** (Integrated Regional Operational Programme 2004–2006, unified text 2007, p. 86).

The objective of Priority 2. was to create conditions for development of human resources at the local and regional levels and improvement of the ability to programme and implement projects in the area of human resources. Implementation of measures aimed at professional reorientation of employees before they become unemployed and requalifying people abandoning agricultural professions is of special importance. Measures implemented as part of this Priority were focused above all on the areas at risk of marginalisation, including in particular rural areas and industry restructuration areas. The specific objectives of Priority 2 included: (1) increasing flexibility and vocational mobility of human resources, (2) increase possibilities for people working in agriculture as well as in companies and sectors being restructured through changing their vocational qualifications, (3) increasing the percentage of youth from rural areas being in a difficult financial situation in the total number of students of upper secondary schools, (4) increasing the percentage of students from areas at risk of marginalisation, in particular from rural areas and areas of industry restructuration in the total number of students, (5) supporting the process

of creating innovative regional systems based on cooperation between the regional research and development sector with local companies, (6) promoting entrepreneurship through comprehensive support for people starting their own businesses (Integrated Regional Operational Programme Complement 2004–2006, unified text 2007, p. 83).

From the point of view of the problems raised in the *Equalising Opportunities on the Labour Market for People Aged 50+* project, objectives (1) and (2) above were of special importance; they were implemented mainly through **Measure 2.1. Development of competencies linked to the regional labour market needs and life-long learning opportunities**. It encompassed two important areas: supporting development of professional qualifications and research and analyses for the purposes of the regional labour market. Potentially, also the implementation of objective (6) of Priority 2. of the Integrated Regional Operational Programme could contribute to increasing economic activity of people aged 50+/45+ through stimulating them to start their own businesses. **Measure 2.5. Entrepreneurship Promotion** envisaged training, counseling and financial support for the creation of new enterprises. Unlike in Phare 2003, no measures targeted at the age group of 50+ (or 45+) were prepared, as a result of which people at an immobile age from among the beneficiaries of the projects implemented within Measure 2.5. were not covered by preferences and, as indicated by institutions implementing this Measure, no projects were implemented fulfilling the criteria adopted in this study (people aged 50+/45+ did not constitute at least a half of the participants).

Within Priority 2. of the Integrated Regional Operational Programme, projects could be addressed to the target group of people aged 50+ or 45+ (there were no restrictions or preferences with this regard). The list of monitored indicators did not include the number of people aged 50+ or 45+.

According to the Integrated Regional Operational Programme Complement 2004–2006 of 17 January 2007, allocation of funds of Priority 2. of the programme amounted to 600,018,911.82 EUR. The total amount allocated to Measure 2.1. was 145,650,475.25 EUR. Allocation of funds of Measure 2.1. to the individual voivodeships oscillated between approximately 3 million EUR in the Opole and Lubuskie Voivodeships to approximately 10 million EUR in the Śląskie and Mazowieckie Voivodeships. The Integrated Regional Operational Programme projects identified in the study in which people aged 50+/45+ constituted at least a half of the beneficiaries had the total value of 9.2 million PLN. The value of the projects oscillated between 35.7 thousand PLN to over 2.5 million PLN, i.e. from approximately 900 PLN to 8 thousand PLN per one participant.

At the stage of research on projects aimed at equalisation of opportunities of people aged 50+/45+ it was possible to verify only a small number of projects implemented within the Integrated Regional Operational Programme. The information obtained from the VEOs suggest that within the Integrated Regional Operational Programme only the voivodeship employment office in Kraków, the Dolnośląskie Voivodeship employment office and the voivodeship employment office in Białystok communicated implementation of the total number of 16 projects of the Integrated Regional Operational Programme addressed at least in 50% to the target group referred to above (cf. Table II.9.)<sup>44</sup>. **The projects were implemented above all as part of Measure 2.1. of the Integrated Regional Operational Programme.**

<sup>44</sup> Information on the projects were found in their documentation obtained by the project team from the implementing institutions.

**Table II.9.** List of projects aimed at equalisation of opportunities of people at an immobile productive age implemented with the funds of the Integrated Regional Operational Programme

No.	Project title	Beneficiaries	Voivodeship
1	English language training for agricultural consultants from the Dolnośląskie	Wrocław University of Environmental and Life Sciences	Dolnośląskie
2	Physician, nurse — a modern employee of the health care services of the Copper Mining Region in the European Labour Market	Dolnośląskie College of Entrepreneurship and Technology in Polkowice	Dolnośląskie
3	Interpersonal skills course for agricultural consultants	Dolnośląskie Centre of Agricultural Advisory Services in Wrocław	Dolnośląskie
4	Improving the qualifications of agricultural consultants in the area of EU project management	Dolnośląskie Centre of Agricultural Advisory Services in Wrocław	Dolnośląskie
5	Competent employees improve their qualifications. ICT and English for people aged 40+	Instytut Zarządzania i Samorządności sp. z o.o., Wrocław	Dolnośląskie
6	Training in the area of zoonoses for physicians from the Dolnośląskie	Jelfarma Promocja Medyczna s.c., Jelenia Góra and Wrocław University of Environmental and Life Sciences	Dolnośląskie
7	ENGINEER OF THE FUTURE — counseling and training programme for technical employees of Dolnośląskie	Leadership Development Regina Bisikiewicz, Wrocław	Dolnośląskie
8	Improving professional qualifications of employees in the area of modern information and communication technologies	Prywatne Centrum Kształcenia Kadr, Jelenia Góra	Dolnośląskie
9	Obtaining new professional qualifications by people at risk of restructuring through computer skills, communication, negotiation and selling techniques training sessions in the Dolnośląskie Voivodeship	VENTO CONSULTING Paweł Schmidt, Poznań	Dolnośląskie
10	Administrative employees of the health care sector improve their qualifications in the area of ICT technologies and the English language	Wrocławski Medyczny Park Naukowo-Technologiczny sp. z o.o.	Dolnośląskie
11	Business to Business English. English language courses and obtaining LCCI certificates	Instytut Organizacji Przedsiębiorstw i Technik Informatycznych InBIT sp. z o.o., Szczecin	Małopolskie
12	Business to Wirtschaftdeutsch. German language courses and obtaining certificates from the Goethe-Institute	Instytut Organizacji Przedsiębiorstw i Technik Informatycznych InBIT sp. z o.o., Szczecin	Małopolskie
13	Licence to success. Practical use of a computer in professional life	Instytut Organizacji Przedsiębiorstw i Technik Informatycznych InBIT sp. z o.o., Szczecin	Małopolskie
14	e-Senior — information technology in economic activation of people aged 50+	Agencja Rozwoju Regionalnego "ARES" SA, Suwałki	Podlaskie
15	e-Senior — information technology in economic activation of people aged 50+ — 2nd edition*	Agencja Rozwoju Regionalnego "ARES" SA, Suwałki	Podlaskie
16	"40" — forty. Forty opportunities for succeeding in professional life	9th Mounted Rifles Regiment's School Complex No. 2, Grajewo	Podlaskie

\* The project is a separate item in the IT system, but is continuation of project No. 14, with identical support rules.

Source: Prepared by the author on the basis of "projects summaries".

Analysis of the list of projects presented below can lead to two main conclusions:

- there is a small number of voivodeships in which the Integrated Regional Operational Programme was used as a source of financing of measures targeted at equalisation of opportunities for employees aged 50+/45+,
- there is a certain specialisation of beneficiaries of projects addressed to the elderly as 9 out of 16 projects were implemented by the same four institutions.

The average value of a project was approximately 575 thousand PLN (approximately 4.3 thousand per participant). They were targeted at more broadly defined target groups, but at least one half of the beneficiaries were people aged 45+ or 50+. From the point of view of the number of beneficiaries there were both small projects (approximately 40 beneficiaries) and projects targeted at approximately 200 or even more than 300 people. Many of them were addressed to a narrowly defined group of recipients — agricultural consultants, engineers, health care system employees.

The implemented projects were all training projects. Due to the kind of support (usually e.g. language courses) the duration of the projects implementation was longer than in the case of the SOP HRD projects analysed earlier and lasted even three years. Most projects envisaged language training and multi-module IT training. **As such, the projects filled the competence gaps diagnosed among this age group.** A strength of many of these projects was certification of the beneficiaries' abilities with the commonly accepted language certificates (certificates of the Goethe-Institute, LCCI English for Business) and IT certificates (ECDL); in all the projects completion of the training was confirmed with an appropriate document.

The discussed Integrated Regional Operational Programme projects, addressed to employees aged 50+ (or 45+) were in most cases adjusted to the specific needs of the individual professional groups. Apart from the training support in the area of language and IT skills, the projects offered specialist vocational courses. One of the problems, however, was the intensiveness of the training sessions offered. Considering the fact that the participants took part in the training sessions in their free time, a 300 hours' practical and theoretical qualification course for nurses in a given area of nursing proved to be an excessive burden for many participants, which resulted in their giving up and abandoning the course in the middle of the project implementation (despite the attractive offer and course programme).

What is important, some of the "universal" projects whose measures were centred around language or IT training addressed to specific professional group guaranteed participation in training courses in the place of residence, in a group of people with similar professional experience, frequently from the same work environments. This undoubtedly increased the participants' motivation, which was reflected in the obtained results indicators. In the case of language courses, an interesting initiative was to give the best participants the possibility of using the acquired skills in practice during study visits at foreign farms (the project was targeted at agricultural consultants). This undoubtedly contributed to increasing the participants' motivation.

In summary, support targeted at employees aged 50+/45+ should be **more specified**. Apart from foreign language and IT courses filling the basic competence gaps of people at this age, it is important to provide vocational training courses which should lead to obtaining a qualification certificate, with the number of course hours reduced to a minimum.

Participation in the project contributed — apart from obtaining by the elderly of the necessary skills (especially related to foreign language and IT competences) — to improving their self-esteem, improving time management and increasing personal and professional aspirations of the participants. **The projects therefore contributed to equalisation of opportunities for people aged 50+/45+ in the labour market.** The obtained experience formed the basis for measures implemented in further years within Priority VIII of the Human Capital Operational Programme. As indicated in Chapter 6 of this publication, already in 2007 the majority of voivodships implemented pilot programmes targeted exclusively at employees aged 45+.

## 5.4. Analysis of support for equalisation of opportunities for people aged 50+/45+ within the EQUAL Community Initiative Programme

The EQUAL Community Initiative Programme (EQUAL CIP) was implemented in Poland within the financial perspective 2004–2006. In the subsequent perspective, 2007–2013, no operational programme was isolated and the objectives of the EQUAL were included to the Human Capital Operational Programme (HC OP). Measures undertaken within the framework of the EQUAL CIP in Poland complemented the measures implemented as part of the SOP HRD and the Integrated Regional Operational Programme.

In general, the EQUAL Community Initiative Programme (EQUAL CIP) was a part of the European Union strategy aimed at creating better new work places and ensuring that no one is excluded from access to them. One of the special features of EQUAL CIP was the innovative character of the proposed and implemented solutions leading to combatting all forms of discrimination and inequality related with the labour market — on the grounds of sex, racial origin, ethnic origin, religion, beliefs, disability, **age** or sexual orientation, both with regard to employees and people seeking employment. The overriding objective of the EQUAL was initiating changes in the ways of offering assistance to groups which are discriminated in the labour market (*EQUAL... 2005*, p. 10).

EQUAL CIP was implemented on the basis of the following basic principles: thematic approach, partnership, empowerment, transnational cooperation, innovation and mainstreaming (*Initiative... 2004*).

The thematic approach to support was dictated by the need to find new ways of solving problems common to the various types of discrimination and inequality instead of focusing on the individual social groups. EQUAL encompassed nine **thematic areas**, of which only five were included in the EQUAL CIP. These were:

- Theme A. Facilitating access and return to the labour market for those who have difficulty in being integrated or reintegrated into a labour market which must be open to all.
- Theme D. Strengthening the social economy (the third sector), in particular services of interest to the community, with focus on improving the quality of jobs.
- Theme F. Supporting the adaptability of firms and employees to structural economic change and the use of information technology and other new technologies.
- Theme G. Reconciling family and professional life, as well as the reintegration of men and women who have left the labour market, by developing more flexible and effective forms of work organisation and support services.
- Theme I. Supporting social and vocational integration of asylum-seekers.

EQUAL CIP was implemented through strategic partnerships called **Development Partnerships (DPs)** selected in a competition. Development Partnerships encompassed various institutions and organisations important for solving a given problem at various levels of the partnership, e.g.: (i) central and local governments, (ii) social dialogue institutions, including non-governmental organisations, employers' and employees' associations, (iii) enterprises (in particular from the SME sector), (iv) educational institutions and (v) research and development units, both at the local, regional, national and community levels.

The empowerment principle was understood as active involvement in all activities undertaken in order to implement EQUAL CIP both by potential partners and representatives of disadvantaged groups (*The EQUAL Community Initiative 2004*).

A fundamental aspect of EQUAL CIP was **cooperation between Member States**. It was conducted at various levels. Each selected Development Partnership was obliged to start cooperation with at least one Development Partnership from another Member State.

As the EQUAL Community Initiative Programme was a research platform testing innovative approaches with regard to programmes implemented in parallel or systems functioning in parallel, **innovativeness** was treated as a EQUAL CIP priority. Three types of innovation were identified: (i) *process-oriented*: development of new and improvement of the already existing methods, tools and a new approach, (ii) *target-oriented*: formulating new goals, identification of a new approach and opening up new ways to employment, (iii) *context-oriented*: development of a system corresponding to the needs and problems of the labour market within the political and institutional structures.

Ensuring structures and tools of **mainstreaming** (understood as integrating and including new ideas and possible approaches in policies and practice), EQUAL CIP was an important contribution into effective building of policies through practical testing of the effectiveness of the applied solutions and providing access to this knowledge to all the interested parties (*The EQUAL Community Initiative 2004*). The results of EQUAL became a part of the systematic approach to



other policies and programmes which are now being implemented at the local, regional, national and European level.

It should be underlined that **an indicator of the effectiveness of the EQUAL programme was not the number of beneficiaries who received support, but the quality of the developed innovative models (results) to be dissimulated in the labour markets.**

Targeting measures at equalisation of opportunities for people aged 50+ or 45+ in the labour market was possible above all on the basis of Theme F of EQUAL CIP (Objective IV).

The thematic strategy for Theme F envisaged the following objectives:

1. Dissimulation and promotion of flexible forms of employment or other instruments of the labour market.
2. Developing the use in enterprises/organisations of modern information and communication tools.
3. Development or use of innovative methods or organisational solutions of lifelong learning.
4. **Support for employees aged 45+ (50+) with regard to adjusting their qualifications and competences to the requirements of the labour market.**
5. Increasing innovativeness of enterprises/organisations.
6. Increasing the employers' awareness concerning the necessity of training managers and employees in order to increase competitiveness of their companies.

The measures of EQUAL were a chance for reinforcing measures undertaken as part of the national policy, e.g. the "Economic activation of people aged 50+ programme", then at a preparatory stage. These initiatives were accompanied by undertakings dedicated to dissemination among employers and employees of the idea of lifelong learning as a factor increasing competitiveness of enterprises and decreasing the risk of permanent professional deactivation. The undertaken measures were complementary to the international programmes implemented in the territory of the whole European Union (such as Grundtvig or Leonardo da Vinci), whose beneficiaries are also Polish institutions (this subject is discussed in more detail in Chapter 7 of this publication).

As specified in EQUAL CIP, encouraging to improving qualifications is of special importance in the case of people aged 50+, who are relatively frequently characterised by attachment to traditional forms of work and traditional professions.

As revealed in the research conducted within the framework of the *Equalising Opportunities on the Labour Market for People Aged 50+* project, also within **Themes G and D** there were single projects addressed to people aged 50+/45+. According to the provisions of EQUAL CIP, the objective of the programme was, *inter alia*, to develop methods of increasing the effectiveness of the already existing solutions favouring reconciliation of professional life with family life and equalisation of opportunities for both genders (Theme G). Theme D, on the other hand, focused on supporting the creation and development of the Polish model of social economy, e.g. through developing mechanisms of using the possibilities of social economy in economic activation of people at risk of social exclusion, as well as in regeneration of regions characterised by low attractiveness of the labour market and the market of services and in limiting the degree of differences between the regions.

The total financial support for the three Themes indicated above reached approximately 103 million EUR, of which:

- for Theme D: 48,932,090 EUR, which constituted 27.4% of the EQUAL CIP budget,
- for Theme F: 37,681,281 EUR — 21.1% of the total allocation,
- for Theme G: 16,072,584 EUR — 9% of the total allocation,

At the stage of implementation of innovative solutions through Partnerships and developing transnational cooperation (Measure 2. of EQUAL CIP) the value of projects implemented within the framework of the three Themes mentioned above reached 356.7 million PLN, of which the amount of **110.9 million PLN** was spent on projects targeted at people aged 50+/45+<sup>45</sup> (including approximately 70% within Theme F). The value of the projects oscillated between 1.3 million PLN to 12.5 million PLN, with the average at the level of approximately 5.8 million PLN. Half of the projects had the value not lower than 5.4 million PLN. In the subsequent phase (Measure 3. — dissemination of good practices and their mainstreaming), the allocated funds amounted to 11.4 million PLN<sup>46</sup>.

In comparison with the other programmes discussed herein and implemented using the funds of the ESF between 2004 and 2006, obtaining information of projects implemented within the framework of EQUAL CIP is much easier. The generally available project data base including various search criteria, a perfect base of results, numerous publications on the subject and project compendiums — all these sources of information make identification and analysis of projects addressed to people aged 50+/45+ much easier than in the case of SOP HRD, the Integrated Regional Operational Programme or Phare. This study covers only those projects which satisfy at least one out of two criteria: for the “type of beneficiary” criterion people aged 45+ were singled out and/or the “thematic scope according to the HC OP criteria” envisages training programmes for people aged 50+. The list of projects fulfilling these criteria are presented in Table II.10.

**Table II.10.** List of EQUAL CIP projects targeted at people aged 50+/45+

No.	Project title	Partnership Leader (Administrator)	Project number
1	On a Wave	Caritas of the Gdańsk Archdiocese	D0450
2	“Mayday” — model of active support to the development of employees and enterprises in the face of structural changes in the economy	„Solidarity” Trade Union Regional Management in Gdańsk	F0114
3	Employment Fair Play. Promotion of business culture and labour market ethics	Institute for Private Enterprise and Democracy of the Polish Chamber of Commerce — IPED	F0290
4	Maturity makes use of knowledge	Wasko SA	F0640
5	Dynamism and experience — joint change management	Commercial Chamber in Żory	F0613
6	Mentoring through IT	Krajowa Agencja Informacyjna “Info” sp. z o.o.	F0238
7	Model system of companies staff adaptation to structural changes in economy	Polish Craft Association	F0576
8	New opportunities for the transborder labour market and economy of the Nysa Euroregion	Entrepreneurship Support Centre Foundation	F0212
9	“Renowator” centre for small and medium enterprises	Institute of Mathematical Machines	F0101
10	Partnership for development of IT competences in Poland	Wyższa Szkoła Biznesu — National Louis University	F0030
11	The partnership for equalising opportunities	Warmińsko-mazurskie Region of NSZZ “Solidarność”	F0490
12	Idea for success	Wodzisław Powiat — Powiat Starost in Wodzisław Śląski	F0016
13	Let’s build together	Warmińsko-mazurskie Vocational Development Centre in Olsztyn	F0642
14	Alliance for work	The United Nations Development Programme (UNDP)	F0607

<sup>45</sup> As of 30 June 2008, the expenses confirmed by the National Support Structure amounted to 107.1 million zlotys (cf. Financial progress of the implementation of projects EQUAL CIP, state as of 31 August 2008, <http://www.equal.org.pl>).

<sup>46</sup> Within Measure 3., 15 projects targeted at people aged 50+/45+ were financed; as of 30 June 2008 the expenses confirmed by the National Support Structure amounted to 8.4 million zlotys (cf. Financial progress of the implementation of projects EQUAL CIP, state as of 31 August 2008, <http://www.equal.org.pl>).

No.	Project title	Partnership Leader (Administrator)	Project number
15	SASE — Supporting Adaptability of Small Enterprises	Dolnośląska Agencja Rozwoju Regionalnego	F0446
16	@lterEgo	Polish Social Welfare Committee, regional branch in Lublin	G0588
17	The flexible worker — the partnership family	Economy College in Białystok	G0051
18	Labour market consensus – innovative model of vocational activation of women	PLinEU — European Consultants Association	G0403
19	Partnership — family — equality — work	“Pro Europa” Kujawsko-pomorskie Economic Foundation	G0062
20	Life begins after forty	Polish Social Welfare Committee, regional branch in the Świętokrzyskie Voivodeship	G0246

Source: Prepared by the author on the basis of the project data base available in the following portal: <http://www.equal.org.pl>.

The information provided above confirm that equalisation of opportunities in the labour market to people aged 50+/45+ was most strongly emphasised in Theme F of EQUAL CIP<sup>47</sup>.

**Table II.11.** Model solutions implemented as part of the Theme F of EQUAL CIP aimed at supporting employees aged 50+/45+ (objective IV of Theme F)

Result name	Project number	Theme F strategic objective					
		I	II	III	IV	V	VI
System for supporting the process of natural fluctuation of employees using elements of knowledge management and improving professional qualifications of employees	F0238		x		x		x
ICT training vortal supported by a tool for auto diagnosing IT skills	F0030		x	x	x	x	
Model of a support system for maintaining employment of employees aged 50+ in the ship industry	F0114		x		x		x
PLATFORMA E-DIALOG information system	F0059		x		x	x	x
Local system for early identification of problems at poviab labour markets	F0490			x	x	x	x
Competences balancing	F0642			x	x		
“Renowator” — Model Training, Consulting and Traineeship Centre	F0101			x	x		
INTERMENTORING model	F0613			x	x		x
Integrated model for maintaining employees aged 45+ in the labour market based on the jobcoaching methodology	F0607				x		x
Model Knowledge Management System in a Company	F0576			x	x	x	x
Supporting adaptability of small enterprises — partial models of supporting small manufacturing enterprises in coping with structural changes in economy (initial name of the result: Model of support for small enterprises increasing the level of application of new technologies, organisational methods and modern information techniques)	F0446		x		x	x	x

Symbols: I – flexible forms of employment or other labour market instruments, II – modern information and communication tools, III – innovative organisational methods or solutions for lifelong learning, IV – support for employees aged 45+ (50+) for adjusting their qualifications and competences to requirements of the labour market, V – increase in innovativeness of enterprises/organisations, VI – increasing employers’ awareness concerning the necessity of training managers and employees in order to increase competitiveness of their companies.

Source: Prepared by the author on the basis of *Premises for Thematic Strategy for Theme F*, <http://www.equal.org.pl>.

Information provided in Table II.11., the strategic objectives related to supporting the development of competences and qualifications of employees aged 50+ were usually combined with others, most frequently three or four objectives. In the majority of cases, support for employees aged 50+/45+ was combined with an awareness campaign addressed to employers (objective VI)

<sup>47</sup> Apart from the projects listed in Table II.10., a model solution targeted at supporting employees aged 50+/45+ is the Platforma e-dialog partnership which implemented the “PLATFORMA E-DIALOG information system” result. The project was not finally included (nor according to the type of beneficiaries or the thematic scope) in the group of initiatives addressed to people aged 50+/45+.

and/or with innovative organisational methods or solutions for lifelong learning (objective III). This made it possible to undertake multiple measures contributing to improving the situation of people at an immobile age in the labour market.

Projects EQUAL CIP targeted at people aged 50+/45+ were implemented in Development Partnerships combining measures of even a dozen of institutions, among which — apart from the third sector organisations — were organisations of employers and employees, public units (including in particular commune offices, institutions of social assistance and social integration, VEOs), universities and research and development institutes, educational institutions, enterprises.

Projects implemented within EQUAL CIP were targeted to different groups of recipients aged 50+/45+, among which special attention was paid to, *inter alia*, employees working in industries undergoing serious restructuration processes (armaments, mining, ship-making, light industry). The projects were also generally addressed to employees of establishments undergoing restructuration, employees of the health care sector and the construction sector.

In general, the main identified reasons of unequal opportunities for people at an immobile age in the labour market included obsolete qualifications not corresponding to the needs of employers, including insufficient language and IT skills. This was the basis for including this type of training and consulting in the Development Partnership measures. In *The EQUAL Partnership Input into Economic activation of People from the 45+ Group* (2007) study, special attention was paid to five projects whose measures were targeted at people aged 45+ implemented through Partnerships: (1) Let's build together, (2) The partnership for equalising opportunities, (3) Alliance for work, (4) "Renowator" centre for small and medium enterprises and (5) Mentoring through IT. These measures effectively equalised the opportunities in the labour market for project participants at an immobile age through the use of the following solutions:

- **job rotation** — due to the creation of a bank of jobs involving unemployed people with specific qualifications, who took the place of the employees of enterprises for the time of their participation in training sessions (project F0642),
- **jobcoaching** — individualised vocational counseling by a *jobcoach* — an adequately trained beneficiary of the project selected at an earlier stage from among the people covered with support) (project F0607),
- **rapid response teams** — specific groups for supporting employers and employees of establishments undergoing restructuration (project F0490),
- **"Renowator" — Model Training, Consulting and Traineeship Centre**", ensuring comprehensive teletraining, teletraineeship, teleconsulting and coaching services (project F0101),
- **"intergenerational Internet highway"**, through which employees aged 50+ transmitted professional knowledge to university graduates who in turn shared their knowledge concerning the use of ICT tools (project F0238).

Within EQUAL CIP it was possible to develop many other interesting results [cf. *EQUAL Community Initiative Programme Results Guide* (2008) and *Catalogue of the EQUAL Community Initiative Results* (2007)]. Some of them are now often universally implemented within HC OP projects. These include e.g. jobcoaching, mentoring and telework. Mentoring should have a more innovative formula envisaged in the "intergenerational Internet highway" (project F0238 mentioned above) or in the "Intermentoring" (consisting in combining technological mentoring with organisational mentoring — a young employee trains an older one in the area of information technologies while more senior employees introduce young employees in the rules of a given organisation) (project F0613). Other results, e.g. job rotation (using a bank of jobs), also deserve to be dissimulated (project F0642).

Among the EQUAL CIP experiences, solutions in the area of social economy prove to be very valuable; however, they are still insufficiently underlined with regard to the 50+/45+ age group. Social Integration Clubs (KIS), Social Integration Centres (CIS) and social cooperatives can present an attractive offer for the unemployed being in a particularly difficult situation in the labour market (including people at a pre-retirement age with low competences, having great difficulties with finding employment), at risk of or suffering from social exclusion. **A broader use of social**

welfare in different forms of social economy can and should increase the role of ISASI in equalisation of opportunities for people at an immobile age belonging to this category. It is also important to **increase the involvement of social welfare units in creation of new social economy entities in cooperation with poviats employment offices and the local environment** (cf. Szarfenberg et al. 2010, p. 99). Measures of this kind were implemented within the “On a roll” Partnership, whose main achievement was creation of a Local Social Entrepreneurship Organisation Centre — an institution comprehensively supporting economic activation of the unemployed (including those aged 45+).

Problem analysis of EQUAL results (Męcina, Kucharski 2007, p. 27) clearly indicated that it is necessary to place a greater emphasis on programmes activating people over 50 and over 44. An important role is also to be played by dissimulation of programmes proposing reconciliation of different roles (work–life balance) and a broader application of lifelong learning instruments. While implementation of the first of these recommendations was included in the Human Capital Operational Programme, the scope of implementing the others is still insufficient.

It appears that **one of the barriers hindering implementation of many solutions developed as part of EQUAL CIP is, paradoxically, their innovativeness**. This is especially noticeable in the case of the regional component of the HC OP. Considerable competition in obtaining funds places pressure on the projects’ financial effectiveness, hindering implementation of innovative solutions characterised by higher inputs than standard measures. It is all the more important to provide stimuli for a broader application of EQUAL CIP results in HC OP projects through encouraging and awarding their use by beneficiaries. Adoption of the appropriate strategic criterion in competitions (guaranteeing additional point at the stage of substantive evaluation of projects) is already implemented by some institutions involved in labour market policy programming. **Higher grades for adoption of the particularly valuable solutions developed by Partnerships could be an effective encouragement for HC OP project implementers** (we will return to this problem in Chapter 6).

## 5.5. Conclusions and recommendations

The analysis of projects co-financed by the ESF for the period 2004–2006 in terms of equal opportunities for people aged 50+/45+ in the labour market in Poland yields the following conclusions<sup>48</sup>:

1. Projects implemented in the 2004–2006 term provided arguments supporting the key features of beneficiaries aged 50+, predetermining them to be taken special care of in the next financial perspective. This applies especially to those who lost their jobs or are at risk of such a loss. Long-term unemployment leads to a state of passivity, discouragement and apathy in such people. They reduce their activity in all areas: they read less and participate less in the family and social life. The situation, in which they have found themselves, gives rise to frustration and despair. This is especially difficult for them because they have experienced these problems after many years of stable work, often in a single workplace.
2. The issue of economic activation of people aged 50+/45+ has already been taken into account in the pre-accession programmes, although the interest in this group was small. The main source of financing was the **Phare 2003. National Human Resources Development Programme “Support for the employment of people over fifty”**, within which the support of the entrepreneurship of people aged 50+ was financed.
3. Experience from the pre-accession period involving people aged 50+/45+ is not reflected in the 2004–2006 financial perspective. The actions designed under the SOP HRD and IROP were not directed at a target group aged 50+/45+, and only a few institutions started implementing such projects.

<sup>48</sup> Due to the fact that these programmes are already closed and there is no possibility of influencing the direction of the change in the future, SWOT analysis — like in the other chapters of the project — has not been performed.

4. Actions taken under the SOP HRD, addressed to people aged 50+ or 45+, mostly included computer training and / or language courses, activation classes as well as the support of a vocational counselor and a psychologist. The inclusion of psychological care was particularly well received by people aged 50+, which resulted in breaking a number of the project participants' psychological barriers and had a positive impact on changing their attitudes to their own labour market opportunities.
5. In case of IROP training projects aimed at employees aged 50+/45+, smaller projects targeted to specific audiences yielded better results than universal projects. Actions directed at employees in the non-mobile working age should be specified and adapted to the current professional needs of the beneficiaries aged 50+/45+.  
**It is recommended** to accept a strategic criterion rewarding projects where the support is tailored to the specific needs of people aged 50+/45+, representing a particular professional group, as defined in the diagnosis of the project, in all competitions of the Sub-measure 8.1.1. Human Capital Operational Programme.
6. In the 2004–2006 financial perspective the EQUAL Community Initiative Programme was the most targeted on equal opportunities for people aged 50+/45+. Especially the F Theme allowed the funding of activities addressed to people aged 50+/45+. The specificity of the EQUAL Community Initiative, which is a research platform for testing innovative approaches in relation to current programmes or operating systems, allowed the implementation of proposals, completely new or adapted from other areas, of economic activation of people aged 50+/45+. These factors have made the **EQUAL CIP one of the most important elements of support for equal opportunities for people aged 50+/45+ in the labour market in Poland by the EU for 2004–2006**. Additionally, the use of international experience expanded the range of proposed labour market instruments, which may be effective in respect to people in the non-mobile age
7. The results of EQUAL CIP deserve wider dissemination. Due to the pressure on the financial performance of HC OP projects, which hinder the implementation of innovative solutions characterized by higher financial expenses, at the moment they are not used too often. A good, already implemented (albeit only by some intermediary institutions) solution is to reward the use of EQUAL results in HC OP projects by including their use as a strategic criterion.  
**It is recommended that** the inclusion of the EQUAL results developed by projects aimed at supporting people in the non-mobile age as a strategic criterion in HC OP call for proposals, especially if the access criterion distinguishes people aged 45+ as a target group, be wider. At the same time it is recommended to adopt the score which is high enough to constitute a meaningful incentive for the beneficiaries.
8. It seems that the scope in which the social welfare entities use the results developed within the EQUAL CIP is too small. The offer for people of retirement age with low skills, having serious problems finding a job, which results in their social exclusion, should be adopted more extensively in particular by Social Inclusion Centres and Social Inclusion Clubs.
9. Poor (especially in the long term) dissemination of results is a basic shortcoming of projects implemented with the EU funds for 2004–2006.  
**It is recommended to** create financing opportunities for promoting results of the best projects in the long run since their completion. This should apply to products available *online* (the knowledge base, database projects). It could be done by transferring the property rights to the body responsible for implementing employment policies at the national level, which would be responsible for **creating a repository of knowledge related to actions conducive to equalising opportunities for people of non-mobile age, which could be used at different times by all interested in supporting people aged 50+/45+ in the labour market**. Groundwork for such a repository of knowledge has been created by the project *Equalising opportunities on the labour market for people aged 50+*.
10. The projects implemented with the funds for 2004–2006 generally accepted people aged 50 or more as beneficiaries of actions directed to people in retirement. However, after summing up the experiences of that period it has been concluded that in particular activities designed

to preserve the employment should already be carried out for younger audiences. It is justified by the need to prepare people who will soon enter the age of retirement to new challenges in advance, which will strengthen their position through new qualifications and skills. These conclusions have been used in subsequent periods and reflected in the Human Capital Operational Programme.





# Chapter 6

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## Human Capital Operational Programme and its role in economic activation of people aged 50+/45+

### Introduction

- 6.1. Fundamental information about the programme
- 6.2. People aged 50+/45+ as the target group for HC OP support — activities scheduled for 2007–2009
- 6.3. Characteristics of HC OP programmes completed in 2007–2009 aimed at economic activation of people aged 50+/45+
- 6.4. SWOT analysis of projects completed as a part of HC OP
- 6.5. Conclusions and recommendations



## Introduction

The purpose of Chapter 6 is the analysis of activities related to equalisation of opportunities for people aged 50+/45+, implemented with the support of the European Union under the Human Capital Operational Programme (HC OP). This programme covers the whole European Social Fund intervention in Poland in the 2007–2013 financial perspective, and therefore constitutes a source of funding for activities aimed at effective human resources development.

The analysis refers to the main assumptions of the Programme, the action plans for 2007–2008 and for 2009, in the context of the resulting possibilities to support people aged 50+/45+. The essential part of the chapter provides the analysis of the results of research projects carried out in 2007–2009 with the HC OP funds, the target group of which were solely people aged 50+/45+, or from which those people benefitted as a group entitled to special support.

This study presents the expertise on supporting people aged 50+/45+ by projects co-financed by EU funds, which may be useful to the Institute of Labour Market in its work aimed at economic activation. From the perspective of the institutions responsible for the development of regional and local employment policy, an important theme in the analyses is the expertise of individual provinces on the use of Human Capital as an instrument of developing the policy in favor of equalising opportunities for people aged 45+ in the labour market. For promoters applying for EU funds (especially NGOs) this study may be a source of information on proposed activities that promote economic activity of people in the non-mobile working age. The most important best practices are discussed in Chapter 8. Indicated recommendations should contribute to shaping active policy of support for this category of people, primarily in terms of equalising their chances on the labour market.

### 6.1. Basic information on the programme

This section will discuss the main features of the Human Capital Operational Programme and the degree of their implementation, particularly in relation to the tasks of the regions. As it is clear from the analyses carried out in 2007–2009, the ESF support for beneficiaries aged 45+ was implemented mainly at regional level. Therefore, when assessing the scale of activities for the equalisation of opportunities for people aged 45+ in the labour market (section 2–3 of this chapter), the different priorities of HC allocation, especially those that are coordinated regionally, must be taken into account.

Human Capital Operational Programme is one of the operational programmes implemented in Poland in 2007–2013, included in the National Cohesion Strategy. The main objective of the programme is to increase the level of employment and social cohesion. To achieve this goal strategic objectives have been identified, which are defined on the basis of a socio-economic diagnosis of the country and the SWOT analysis, in line with the basic strategic documents developed at the Community and national level (HC OP 2007, p. 124). The most important economic activity issues for people aged 50+/45+ are three specific objectives: the first, the third and the sixth objective<sup>49</sup>.

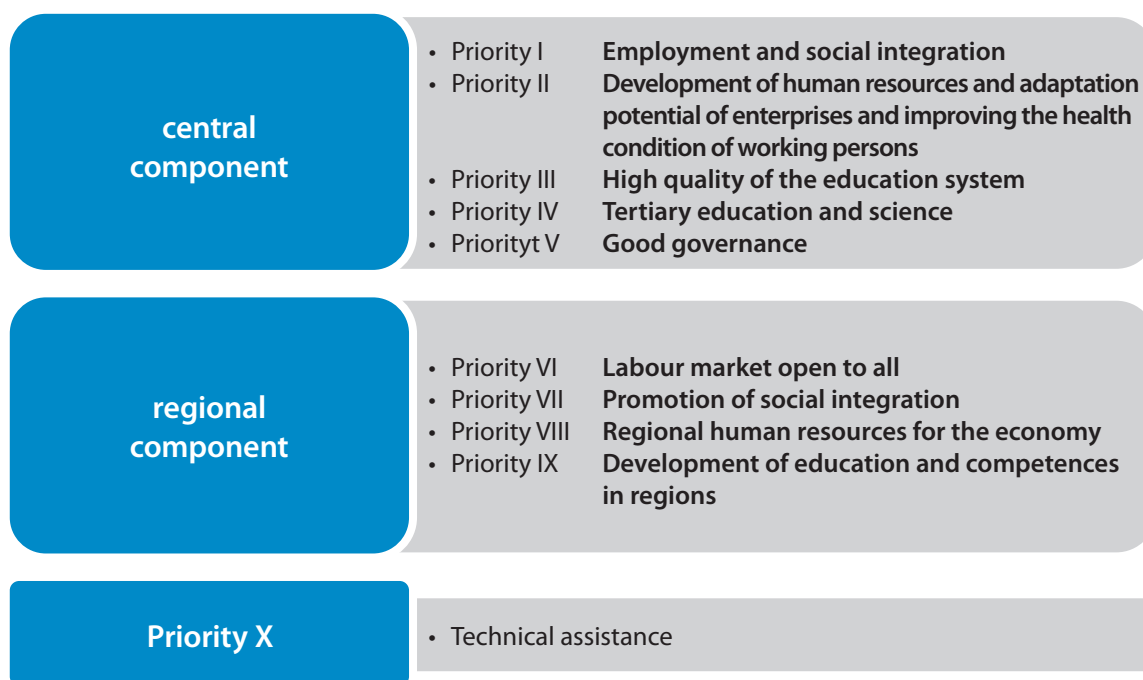
**The first strategic objective** of the HC OP — “Raising the level of economic activity and employability of the unemployed and economically inactive” — focuses primarily on those target groups that are most disadvantaged in the labour market. In particular, the account is taken of young people who enter the labour market for the first time, women, the long-term unemployed, people living in rural areas, which due to the low level of education and limited availability of jobs in non-farm sector experience serious difficulties in finding employment, as well as **people**

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<sup>49</sup> Given the nature of this study, the other objectives of HC OP, not directly related to the issues of this paper, have been omitted. Details can be found in the Human Capital Operational Programme (2007).

**of pre-retirement age, who are characterized by generally low spatial and occupational mobility.** (*Detailed description of priorities... 2007*).

This objective is carried out mainly through activities related to improving skills and matching them to the needs reported in the labour market. Specifying people of pre-retirement age as one of the target groups of these actions makes the objective of the first Human Capital Operational Programme one of the most important instruments of equalising opportunities for people aged 50+/45+ in the labour market in Poland.



**Diagram II.2.** The list of priorities implemented within HC OP

Source: Own study based on a document of the Human Capital Operational Programme (HC OP) (2007).

**Also the third strategic objective of the HC OP** — “Improving the adaptability of workers and enterprises to changes in the economy” — highlights the activities that are conducive to greater economic activity of people aged 45+. This objective results in main activities related to: completing the privatization process and supporting the restructured companies and their employees, strengthening the system of business support institutions, especially through training and consulting services, development of cooperation between the sphere of R&D and entrepreneurs, the dissemination of ICT in business activities and their use by employees at work, dissemination of knowledge on how to take up work in various forms of employment, promoting the use of flexible forms of employment, the dissemination of the idea of lifelong learning and investing in human capital in enterprises. (*Detailed description of priorities... 2007*). These actions are aimed at people from high risk groups in the labour market, including the **elderly** and low-skilled. Therefore they largely refer to the **population aged 50+/45+, which is the subject of our research**, in respect to acquiring new skills or retraining. Thanks to such activities the position of such people in the labour market can be improved.

**The sixth strategic objective** of HC OP — “The increase in territorial cohesion” — provides support for: (i) the unemployed in order to equalise their labour market opportunities, (ii) people threatened with social exclusion, **including people aged 50+/45+**, in order to increase their level of participation and inclusion into society, and (iii) the businesses and their employees. An important element in the support of territorial cohesion is also the implementation of regional programmes to ensure equal access to education for all citizens (even at the level of the lifelong learning) (*Detailed description of priorities... 2007*). These activities are important to people disadvantaged in the labour market (unemployed, at risk of losing their jobs, socially excluded),

among which there are also **people aged 50+/45+**, because of the possibility of improving their situation on the regional labour market. This objective is only implemented at the regional level, which should ensure that actions aimed at people aged 50+/45+ are better adjusted to the needs of these people and the local labour market.

To achieve the strategic objectives of the Human Capital Operational Programme, 10 priorities, implemented in parallel, were formulated (see Fig. II.2.).

The different priorities of the HC OP are characterized below in a synthetic way, with a focus on the opportunities created in respect to the equalisation of opportunities for people aged 50+/45+ in the labour market.

**Priority I: Employment and social integration** means supporting partnerships between various operators for social inclusion, which contributes to the better use of the potential of national institutions for the unemployed and the people at risk of social exclusion. The priority projects are aimed at promoting the idea of equal treatment of women and men in access to employment, balancing work and family life, and fighting all forms of discrimination in employment.

**Priority II: Development of human resources and adaptation potential of enterprises and improving the health condition of working persons** supports the supra-regional and national training (including postgraduate education), counseling for employees and entrepreneurs and social partners to increase the adaptability of workers and enterprises.

**Priority III: High quality of education** takes action aimed at enhancing the functioning of the education system, assuming the implementation of system solutions for monitoring and evaluation, development of educational research and its links with education policy. The new solutions also include measures to increase the effectiveness of pedagogical supervision exercised by school superintendents.

**Priority IV: Tertiary education and science** focuses on increasing the quality of functioning of higher education institutions Both by creating favorable systemic and organisational conditions for effective managing the higher education, and providing the development impulse influencing the availability and development of faculties which of major importance for the economy based on knowledge.

**Priority V: Good Governance** means supporting the regulatory potential of the Polish administration by improving the lawmaking process and the review of existing legislation in terms of opportunities for simplification. Actions under Priority V revolve around four key aspects of better regulation: simplification of national legislation, strengthening the implementation of European Union directives, in particular environmental directives and those related to the functioning of the Common Market, optimization of the impact assessment system and implementation of a system for measuring administrative costs.

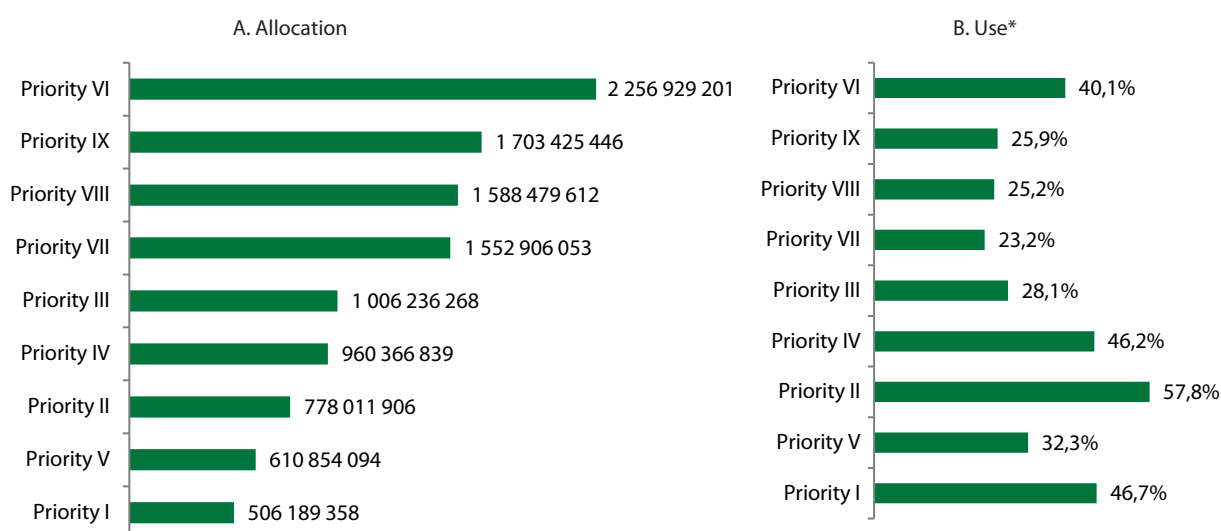
**Priority VI: The labour market open to all** assumes economic activation of the unemployed in the individual regions. Priority support is primarily focused on selected target groups who are experiencing the greatest difficulties in entering the labour market and staying there. These groups include young people (up to twenty-five years of age) who have no professional experience and no qualifications necessary to finding employment, women (especially single mothers), **older people — aged 45+, who have difficulty adjusting to the requirements of modernizing economy**, and people with disabilities seeking employment in the open market. In addition, support under Priority is aimed at the long-term unemployed, whose reintegration into the labour market is usually the most time-consuming and requires different activation instruments.

**Priority VII: Promotion of social integration** takes steps to facilitate access to the labour market for people threatened with social exclusion and the development of the institution of social economy as an effective form of social and professional integration. The projects are directed to the following audiences: people with disabilities, the long-term unemployed, the immigrants, people leaving foster care facilities or prisons, seen stereotypically by employers and the social environment as less flexible and less mobile employees, clients of social welfare, economy entities and social welfare institutions, rural residents, employees of social welfare institutions. Seniors are therefore not explicitly mentioned as a target group, but as a category in a special

situation on the labour market, threatened with social exclusion due to the long-term unemployment, people aged 50+ are an important segment of the public support under Priority VII.

**Priority VIII: Regional human resources for the economy** focuses on providing broad support to businesses and individuals covered by the restructuring processes and the processes of re-profiling operations. The need to stimulate the improvement and update of professional skills by working people, especially the elderly and low-skilled, which is crucial for maintaining their activity on the labour market, has been clearly highlighted in the description of this priority. **Although the description of projects under Priority VIII does not directly show people aged 50+ or 45+ as beneficiaries of public actions, we can assume that they are one of the key categories of customers.** Evidence in this regard is provided by the results of the analysis of strategic criteria and access in 2007–2008 and in 2009, presented later in this chapter and discussed in detail further below.

**Priority IX: Development of education and competence in regions** implement actions involving support targeted to individuals and institutions committed to the education process, designed to equalise educational opportunities in education through the introduction of high-quality educational services. In particular, the areas and environments that face the strongest barriers to accessing high-quality educational services are supported. Important elements of Priority IX are the development programmes for schools and educational institutions, which will involve, among others, additional extra-curricular and after school activities for students. On the one hand they constitute an instrument for equalising educational opportunities of students, on the other, they reinforce the importance of key competences in the learning process. A total of 11 420 207 059 € (EUR) was allocated for the implementation of the Human Capital Operational Programme for the period of 2007–2013. The volume of funds involved in its implementation amounted to approximately 14.43% of the total funds allocated to the operational programmes. Within this amount the size of the allocation from the European Social Fund for 2007–2013 is around 9 707 176 000 EUR and the national contribution is about 1 713 031 059 EUR. The detailed allocation of resources by priority and the extent of their use is shown in Figure II.10



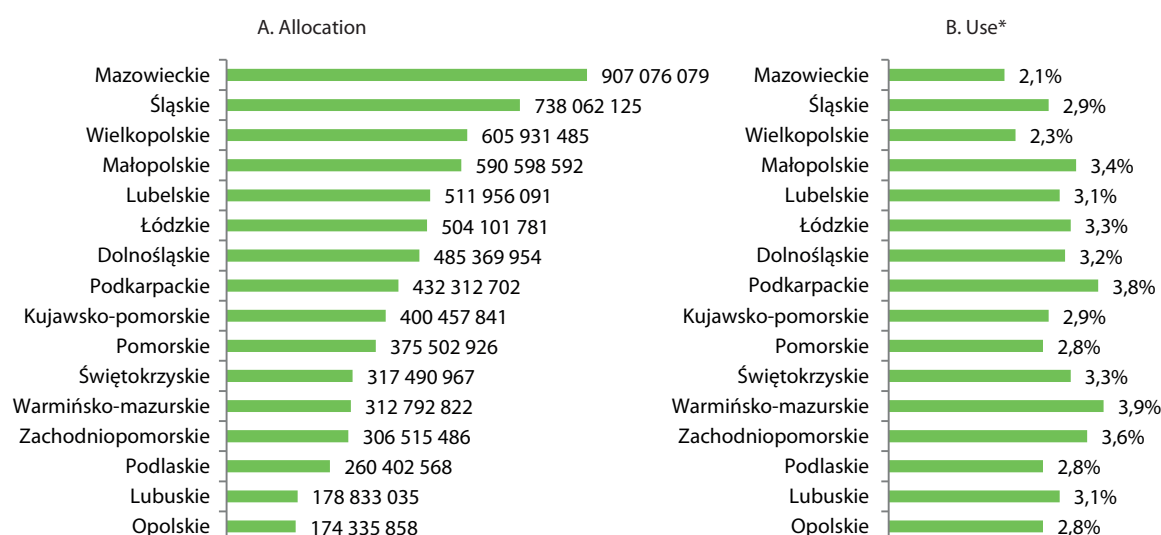
**Figure II.10.** Allocation of Human Capital Operational Programme 2007–2013 (in EUR) and their use in the years 2007–2009 (in %) according to the priorities.

\* Means contracted as of 01.04.2010,

**Source:** Own study based on: *Human Capital Operational Programme. National Strategic Reference Framework 2007–2013*, Ministry of Regional Development, Warszawa 2007, p. 238, and monthly information on the implementation of the Human Capital Operational Programme 2007–2013 (as of 4 January 2010), [http://www.efs.gov.pl/AnalizyRaportyPodsumowania/poziom/Documents/informacja\\_0401.pdf](http://www.efs.gov.pl/AnalizyRaportyPodsumowania/poziom/Documents/informacja_0401.pdf), p. 5

Most funds were allocated to regional priorities (VI, VII, VIII, IX). This is important from the standpoint of the problems of this chapter, since — as it will be demonstrated later — in

2007–2009 these priorities of the HC OP were the most used as instruments of financing aimed at equalising opportunities for people aged 50+/45+. Note the Priority VI, under which the economic activation of the unemployed (including age 45+) is funded — in this case, the degree of utilization is relatively high (around 40% in 2007–2009). In contrast, the relatively smallest range of utilization of resources was recorded in 2007–2009 under Priority VII (less than 1 / 4 the assumed allocation). From the perspective of equalising opportunities for people of pre-retirement age this priority is less important than Priority VI, yet with the right emphasis on this target group in the forthcoming competition documentation, it may be an important tool for equalisation of opportunities for people aged 50+/45+ in the labour market.



**Figure II.11.** The allocation of the regional component of the Human Capital Operational Programme 2007–2013 (in EUR) and their use in the years 2007–2009 (in %) by province

\* means allocated as of 4.01.2010 r.

**Source:** Own study based on: Detailed description of the priorities of the Human Capital Operational Programme 2007–2013, Ministry of Regional Development, Warszawa 2007, p. 301, and monthly information on the implementation of the Operational Programme Human Capital 2007–2013 (as at 4 January 2010.) [http://www.efs.gov.pl/AnalisyRaportyPodsumowania/poziom/Documents/informacja\\_0401.pdf](http://www.efs.gov.pl/AnalisyRaportyPodsumowania/poziom/Documents/informacja_0401.pdf), p. 10

In assessing the use of the regional component of the HC OP it is worth noting that most contracts (4 614) were included in the Priority IX, „Development of education and competence in regions.” However, these were mostly small projects, worth over 1.8 billion PLN. Much larger projects are implemented under the Priority VI (with clearly smaller number of contracts — 2 475 — with expendable funds worth over 3.7 billion PLN) (*Monthly Information... 2010*, p. 5).

When assessing the actions conducive to providing equal opportunity in the labour market for people aged 50+/45+, conducted in individual voivodeships, their potential resulting, among others, from the amount of funds received, should be taken into account. Analysis of Figure II.11.A shows that in absolute terms the Mazowieckie Voivodeship has the greatest means under the regional component of the HC OP (over 900 million EUR). However, in the ranking based on the criterion of using these resources (Fig. II.11.B), the less developed regions — Warmińsko-mazurskie and Podkarpackie Voivodeships, which in 2007–2009 has already contracted about 40% provided for these measures, were at the forefront. It should therefore be expected that precisely in those provinces the most notable effects would occur also in the field of equalising opportunities for people aged 50+/45+. Such an assessment will be conducted in the following sections of this chapter.

Given the number of contracts signed, it is worth noting that in 2007–2009, a total of 13 250 grant agreements for the amount of public funds equal to almost 8.7 billion PLN (see Figure II.12) were concluded within the framework of the regional component of HC OP. According to the cri-

terion the mentioned earlier Warmińsko-mazurskie and Podkarpackie Voivodeships also ranked in the forefront, but were overtaken by the Mazowieckie, Łódzkie, Śląskie and Wielkopolskie. This follows naturally from the larger stream of HC OP funds directed to these voivodeships.

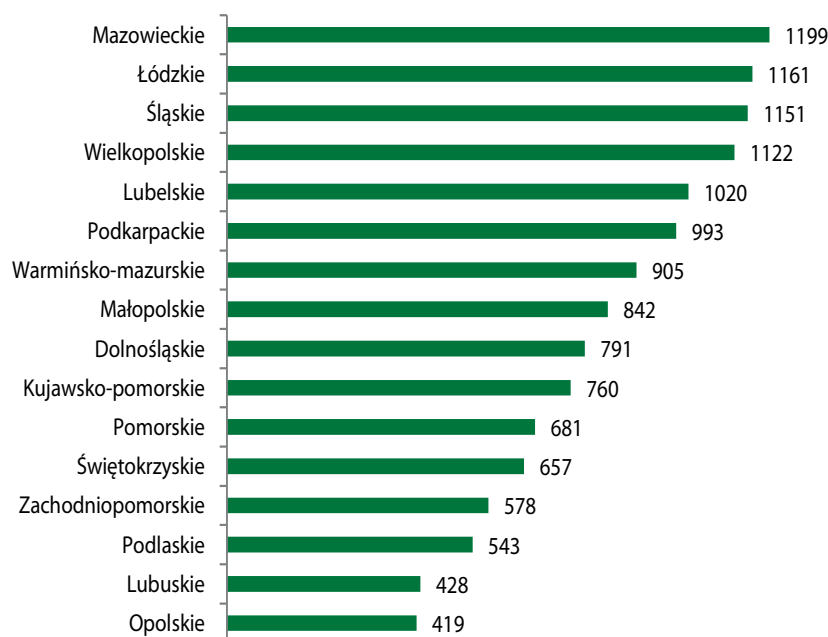


Figure II.12. Number of contracts signed under the regional component (as of 04.01.2010 r.)

Source: Own calculations based on monthly information on the implementation of the Human Capital Operational Programme 2007–2013, [http://www.efs.gov.pl/AnalisyRaportyPodsumowania/poziom/Documents/informacja\\_0401.pdf](http://www.efs.gov.pl/AnalisyRaportyPodsumowania/poziom/Documents/informacja_0401.pdf), p. 8

## 6.2. People aged 50+/45+ as a target group for HC OP support — activities for 2007–2009

Actions designed under the Human Capital Operational Programme may have a direct impact on projects undertaken by the beneficiaries, provided however, that the action plans for individual HC OP priorities address the needs of the people aged 50+/45+. In order to assess the extent of exposing the group aged 50+ or 45+ as a target group of support under the various priorities of HC OP, the analysis of action plans for 2007–2008 and for 2009, prepared by the Intermediate bodies for each Priority, was conducted.

### Central component of HC OP

Analysis of action plans of Priorities III and IV showed no particular preference of people of pre-retirement age as beneficiaries of the action taken.

Within the framework of Priority I, the system project *Equalising labour market opportunities for people 50+*, entered in the Action Plan for 2009 for Measure 1.1., which resulted, inter alia, in this publication, deserves attention. However, this is the only action specified in relation to this target group under this priority.

On the other hand, in the Action Plan for 2007–2008 for Priority II Sub-measure 2.1.1. „Development of human capital in enterprises — call for proposals” one of the strategic criteria was the participation of least 20% of people over the age of 50 in the total number of planned trainees under the project (**the beneficiary received additional 20 pts at the substantive evaluation stage of the project for the fulfillment of this criterion.**). In the Action Plan for 2009



preferences for people aged 50+ as a part of the target group appeared in call for proposals for Sub-measure 2.1.1. “Closed Supra-regional training projects (general and specialist) and counseling for entrepreneurs and employees of companies, based upon the development strategies of individual companies.” In the first contest in 2009, the strategic criteria related to people aged 45+. It was assumed that a minimum percentage of participants over 45 years of age participating in the training modules of ICT would be **40%** of all participants, as well as **at least 40%** of participants receiving individualised support projects (such as mentoring, coaching) should be aged 45+. This strategic criterion favors people aged 50+/45+, facilitating their access to ICT training. Accepted minimum thresholds for participation of beneficiaries aged 45+, however, were so low, that the fulfillment of the above criteria did not force beneficiaries to take special and additional measures aimed at people aged 50+/45+. The criteria were valid rather for the assessment of submitted application and the possibility of activation of these people. However, this should be clearly noted that such requirements for projects increase chances for “elderly” people to participate in the project, and thus for improving their skills and competencies.

In the case of Priority V, **people aged 50+/45+ as the preferred group for supporting were included in the specific project selection criteria** only in projects aimed at improving the competence of personnel and the modernization of management processes, to be implemented in the system mode from 2009. A training module for employees of public administration in the age group 45+ was implemented under the projects. This support was tailored to the specific needs of the target group, while in the part devoted to the modernization of management processes, the access of 1/3 of people over 45 to training was defined as a criterion in the detailed criteria for selecting a project. This is particularly important from the standpoint of ensuring the equal access to training for people aged 45+, in accordance with the principle of equal treatment.

No major activities aimed at this age group in the system projects may result in reluctance of employers to employ people over 45 years of age who are seen as less valuable employees due to the maladjustments of skills and qualifications to the requirements of the knowledge based economy (e.g. lack of language skills and the ability to use modern computer and communication technologies).

### Regional component of HC OP

Action plan for Priority VI The labour market open to all for the years 2007–2008 and in 2009, analysed in the regional voivodeship) system, show support aimed at people aged 50+/45+ employed and unemployed, in the form of guidelines for the selection of projects — strategic and access criteria. Under the Sub-measure 6.1.1. “Support for the unemployed in the regional labour market” in 2007 pilot projects started in 11 voivodeships, where one of the preferred target groups were people aged 50+/45+. In 2008–2009, under the Sub-measure 6.1.1. and Measure 6.2. “Support and promotion of entrepreneurship and self-employment” in almost all provinces projects involving people aged 50+/45+ were rewarded. Each province allocated individually what percentage of the target group should be people aged 50+/45+. The largest, because 100% share of this group of people was required for projects implemented in 2009 in Pomorskie, Zachodniopomorskie, Opolskie, Łódzkie, Podkarpackie and Świętokrzyskie Voivodeships. A detailed analysis of action plans including the involvement of people aged 50+/45+ is presented in the Table II.12.

**Table II.12.** Activities aimed at people aged 50+/45+ in terms of equalising opportunities in the labour market in the Action Plans for 2007–2008 and 2009 for the Priority VI of the Human Capital Operational Programme by voivodeship

Voivodeship	Support scope				
	Sub-measure	2007–2008	Sub-measure	2009	
Dolnośląskie	6.1.1	Pilot programme 2007. People aged 45+ as one of the preferred target groups	6.1.1	People aged 45+ as one of the preferred target groups	
	6.1.1	2008. Preferred people aged 45+			
Kujawsko-pomorskie	6.1.1	Pilot programme 2007 People aged 45+ as one of the preferred target groups	6.1.1	Min. 60% are people aged 45+, support tailored to the specific needs of this group	People aged 45+ as one of the preferred target groups
			6.2	People aged 45+ as one of the preferred target groups	
Lubelskie	6.1.1	Pilot programme 2007. People aged 45+ as one of the preferred target groups	6.1.1	Min. 70% EB* are women aged 45+, support tailored to the specific needs of this group	
	6.2	People aged 50–64 as one of the preferred target groups			
Lubuskie	6.1.1	Pilot programme 2007. People aged 45+ as one of the preferred target groups	6.1.1	Min. 80% EB are people aged 45+	
	6.1.1	2008. Min. 50% EB are people aged 50+ (as one of the preferred target groups)	6.1.2	Training for the PES key employees in respect to supporting the unemployed aged 45+	
	6.2		6.2	Min. 80% EB are people aged 45+ (as one of the preferred target groups)	
	6.3				
Łódzkie	6.1.1	Min. 50% EB are women aged 45+ “non-mobile” professionally (as one of the preferred target groups)	6.1.1	100% EB are people aged 45+, support tailored to the specific needs of this group	
	6.2	Min. 40% EB are people aged 50–64 (as one of the preferred target groups)	6.2	Min. 50% EB are people aged 45+	
Małopolskie	6.1.1	People aged 50–64 as one of the preferred target groups	6.1.1	EB are people aged 45+ from the area of the Kraków City subregion	
			6.1.1	100% EB are people aged 45+ from the area of a subregion including the following poviats: krakowski, miechowski, proszowicki, wielicki, myślenicki	
Mazowieckie	6.1.1	Pilot programme 2007. People aged 45+ as one of the preferred target groups	6.1.1	Min. 10% EB are people aged 45+, support tailored to the specific needs of this group	Min. 50% EB are people aged 45+
			6.2	Min. 25% EB are people aged 45+, support tailored to the specific needs of this group	
Opolskie	6.1.1	Pilot programme 2007. People aged 45+ as one of the preferred target groups	6.1.1	100% EB are people aged 45+	
Podkarpackie	6.1.1	Pilot programme 2007. People aged 45+ as one of the preferred target groups	6.1.1	100% EB are people aged 45+	
Podlaskie	6.1.1	Pilot programme 2007. People aged 45+ as one of the preferred target groups	6.1.1	Min. 50% EB are people aged 45+ as one of the preferred target groups	

Voivodeship	Support scope			
	Sub-measure	2007–2008	Sub-measure	2009
Pomorskie	6.1.1	Pilot programme 2007. People aged 45+ as one of the preferred target groups	6.1.1	100% EB are unemployed people aged 45+
	6.1.1	2008. People aged 45+ as one of the preferred target groups	6.2	100% EB are people aged 45+
	6.2	People aged 45+ as one of the preferred target groups		
Śląskie	6.1.1	Pilot programme 2007. People aged 45+ as one of the preferred target groups	6.1.1	Min. 40% EB are people aged 45+, support tailored to the specific needs of this group
	6.1.1	2008. People aged 45+ as one of the preferred target groups		
Świętokrzyskie	No guidelines related to people aged 50+/45+		6.1.1	Preferred people aged 45+, support tailored to the specific needs of this group
			6.1.1	100% EB are people aged 45+, support tailored to the specific needs of this group
Warmińsko-mazurskie	6.1.1	Pilot programme 2007. People aged 45+ as one of the preferred target groups	No guidelines related to people aged 50+/45+	
Wielkopolskie	6.1.1	Min. 30% EB people aged 45+ (as one of the preferred target groups)	6.1.1	100% EB are people aged 45+, support tailored to the specific needs of this group
			6.2	Min. 70% EB are people aged 45+ (as one of the preferred target groups)
Zachodniopomorskie	6.1.1	Pilot programme 2007. People aged 45+ (as one of the preferred target groups)	6.1.1	100% EB are people aged 45+
	6.1.1	2008. People aged 45+ as one of the preferred target groups	6.2	Min. 25% EB are people aged 45+ (as one of the preferred target groups)

\* EB — End Beneficiary

\*\* Record „one of the preferred target groups” means that the access criteria or strategic criteria provided for the share of other target groups beside those aged 50+/45+, as a preferred target groups for support, such as women, disabled people under 25 years of age, the long-term unemployed, residents of rural municipalities, urban-rural municipalities and towns under 25 thousand residents, etc. The criteria for access (gray) determine the mandatory thresholds for beneficiaries. Meeting the strategic criteria (green) allows beneficiaries to obtain additional points at the stage of substantive evaluation.

Source: Own study based on Priority VI Action Plans in 2007–2008 and in 2009 for individual voivodeships.

The analysis of the Priority VII Action Plans **Promotion of social integration** showed programming the targeted support for people aged 50+/45+ in the form of guidelines for the selection of projects in the form of access and strategic criteria. Under Sub-measure 7.2.1. “Economic and social activation of people at risk of social exclusion” access and strategic criteria were set for selection of projects on the basis of which projects involving people aged 50+/45+ were rewarded in almost all voivodeships. Each voivodeship allocated individually what percentage of the target group should be aged 50+/45+; the largest, 100% share of this group of people was required for projects in the voivodeships of Podkarpackie, Wielkopolskie, Opolskie. Lubuskie (where at least 80% of the target group were people over 45 years of age) was also high in this ranking. In the remaining voivodeships these were important access criteria and strategic for the selection of projects — this resulted in projects addressed to people aged 50+/45+ implemented with the funds allocated for this activity. Only in the Małopolskie Voivodeship guidelines in the form of access criteria and the criteria for selection of strategic projects addressed directly to a group of people aged 50+/45+ were not specified, which had a significant impact on the small number of projects for this age group implemented under Priority VII in this region (see Figure

II.11). Synthetic information on the records of the action plans taking into account the support for people aged 50+/45+ is presented in the Table. II.13.

**Table II.13.** Activities aimed at people aged 50+/45+ in terms of equalising opportunities in the labour market in the Action Plans for 2007–2008 and 2009 for the Human Capital Operational Programme Priority VII by voivodeship

Voivodeship	2007–2008	2009
		Scope of support
Dolnośląskie	No guidelines related to people aged 50+/45+	Min. 30% EB are people aged 45+
Kujawsko-pomorskie		Min. 50% EB are people aged 45+
Lubelskie		Min. 50% EB are people aged 45+
Lubuskie		Min. 30% EB are people aged 45+ long term unemployed, residents in rural municipalities, urban-rural municipalities and towns under 25 thousand residents, support in the form of subsidized employment
		Min. 40% EB are people aged 45+
Łódzkie		Min. 50% EB* are people aged 45+
Małopolskie		No guidelines
Mazowieckie		Min. 50% EB are people aged 45+
Opolskie		100% EB are people aged 45+
Podkarpackie		100% EB are people aged 45+
Podlaskie		Min. 50% EB are people aged 45+
Pomorskie		Min. 50% EB are people aged 45+
Śląskie		Min. 60% EB are people aged 45+
Świętokrzyskie		Min. 30% EB are people aged 45+
Warmińsko-mazurskie		Min. 50% EB are people aged 45+ and support is tailored to the specific needs of this group
Wielkopolskie		100% EB are people aged 45+
Zachodniopomorskie		100% EB are people aged 45+

\*\*\* The activities aimed at people aged 50+/45+ have been highlighted in the Action Plans for 2009 for Priority VII only for Sub-measure 7.2.1.

Markings — as in Tabl. II.12.

Source: Priority Action Plans VII in 2007–2008 and in 2009 for individual voivodeships.

Measures conducive to greater economic activity of people aged 50+/45+ can also be funded under other activities of Priority VII, such as system projects implemented by social welfare centres or powiat family assistance centres (Sub-measure 7.1.1. and 7.1.2. HC OP). These actions are in fact financed by instruments such as social contract, local activity programme (e.g. providing socially useful work) and the programme of social inclusion and employment of disabled people. The target group age (15–64 years) criterion adopted in the programme means that the projects implemented within the framework of these HC OP activities are not aimed directly at people aged 50+/45+, these people, however, can be, and often are, the beneficiaries of help. Instruments such as: participation in classes organised by Centres of Social Inclusion and Social Inclusion Clubs, funding the economic empowerment in form of starting a business or activity in a social cooperative, a referral to work in the existing social cooperative, inclusion of people with disabilities in classes in economic activation implemented in workshops of occupational therapy, represent an attractive alternative for an „elderly” person who is at risk of social exclusion or who has already been excluded.

Analysis of the Priority VII Action Plans Regional human resources for the economy showed specifying support for workers aged 50+/45+ in form of guidelines for the project selection. It is worth noting that under Priority VIII **the earliest**, compared with other areas of the HC OP, Programmed action was aimed precisely at people aged 45+. In 2007, under the Sub-measure 8.1.1. “Supporting the development of professional skills and consultancy services for enterprises”, pilot projects were launched in 11 voivodeships, in which one of the preferred, and even the only target group was people aged 50+/45+ (see Table II.14.).

**Table II.14.** Activities aimed at people aged 50+/45+ in terms of equalising opportunities in the labour market in the Action Plans for 2007–2008 and 2009 for the Human Capital Operational Programme Priority VIII by voivodeships

Voivodeship	Scope of support			
	Sub-measure	2007–2008	Sub-measure	2009
Dolnośląskie	No guidelines related to people aged 50+/45+		8.1.1	100% EB are people aged 45+, support tailored to the specific needs of this target group (e.g. improving ICT skills)
Kujawsko-pomorskie	8.1.1	Pilot programme 2007. 100% EB are people aged 45+	8.1.1	Min. 40% EB are people aged 45+, support tailored to the needs of the participants (in agreement with the participants themselves)
Lubelskie	8.1.1	Pilot programme 2007. 100% EB are people aged 45+	8.1.1	Min. 20% EB are people aged 45+, projects were related to prevention and health care
Lubuskie	8.1.1	Pilot programme 2007. 100% EB are people aged 45+	8.1.1	100% EB are people aged 45+, the project provides for individual support for participants (e.g. <i>coaching, mentoring, "one on one" training</i> ), used as a complement to competence training.
	8.1.1	2008. Min. 50% EB are people aged 45+	8.1.1	100% EB are people aged 45+, one of the programme modules is improving the ICT skills
Łódzkie	8.1.1	People aged 50+ as one of the preferred target groups)	8.1.1	Min. 50% EB are people aged 45+
Małopolskie	8.1.1	Pilot programme 2007. 100% EB are people aged 45+	8.1.1	100% EB are people aged 45+
Mazowieckie	8.1.1	100% EB are people aged 45+	8.1.1	100% EB are people aged 45+, the training project includes a module related to improving the ICT skills of participants aged 45+
Opolskie	8.1.1	Pilot programme 2007. 100% EB are people aged 45+	8.1.1	100% EB are people aged 45+
Podkarpackie	8.1.1	Pilot programme 2007. 100% EB are people aged 45+	8.1.1	People aged 45+ as one of the target groups
Podlaskie	8.1.1	Pilot programme 2007. 100% EB are people aged 45+	8.1.1	Min. 50% EB are people aged 45+
		2008. 100% EB are employed people aged 50+		
Pomorskie	8.1.1	Pilot programme 2007. 100% EB are people aged 45+	8.1.1	Min. 50% EB are people aged 45+
Śląskie	8.1.1	Pilot programme 2007. 100% EB are people aged 45+	8.1.1	Min. 40% EB are people aged 45+, support tailored to the specific needs of this target group
Świętokrzyskie	No guidelines related to people aged 50+/45+		8.1.1	100% EB are people aged 45+, support tailored to the specific needs of this target group
Warmińsko-mazurskie	8.1.1	Pilot programme 2007. 100% EB are people aged 45+	8.1.1	Min. 50% EB are people over 45 years of age
	8.1.1	2008. Min 20% EB are people over 50+	8.1.1	
Wielkopolskie	No guidelines related to people aged 50+/45+		8.1.1	100% EB are people aged 45+, the project provides for individual support for participants (e.g. <i>coaching, mentoring, "one on one" training</i> ), used as a complement to competence training.
			8.1.2	100% EB are people aged 45+
Zachodniopomorskie	8.1.1	Pilot programme 2007. 100% EB are people aged 45+	8.1.1	Min. 30% EB are people aged 45+, the project provides for individual support for participants (e.g. <i>coaching, mentoring, "one on one" training</i> )

\*\* In all competitions the support was provided for employed people who have secondary education at most and are interested on their own initiative in gaining new qualifications and skills, completing or improving them (in a non-school form).

Markings — as in Tabl. II.12.

Source: Priority VIII Action Plans in 2007–2008 and in 2009 for individual voivodeships.

In 2007–2009, under the Sub-measure 8.1.1. in almost all voivodeships projects involving people aged 50+/45+ were rewarded. Each voivodeship allocated individually what percentage of the target group should be aged 50+/45+. The largest, 100% share of this group of people was required for projects implemented in 2009 in Mazowieckie, Dolnośląskie, Świętokrzyskie and Małopolskie Voivodeships. Synthetic information on the records of the Priority VIII action plans which take into account the support for people aged 50+/45+ are presented in Table II.14.

**Table II.15.** Activities aimed at people aged 50+/45+ in terms of equalising opportunities in the labour market in the Action Plans for 2007–2008 and 2009 for the Human Capital Operational Programme Priority IX by voivodeship

Voivodeship	2007–2008	2009	
		Submeasure	Scope of support
Dolnośląskie	No guidelines related to people aged 50+/45+	9.3	Min. 50% EB are people aged 45+, the projects provides for support tailored to the needs of individual participants of this age
Kujawsko-pomorskie		9.4	Min. 20% EB are people aged 45+, the projects provides for support tailored to the needs of individual participants of this age (in agreement with the participants themselves)
Lubelskie		9.3	Min. 30% EB are people aged 45+, the projects provides for support tailored to the needs of individual participants of this age
Lubuskie		9.3	Min. 80% EB are people aged 45+
Łódzkie		9.3, 9.4	Min. 20% EB* to osoby w wieku 45+
Małopolskie		No guidelines for people aged 50+/45+	
Mazowieckie		9.3, 9.4	100% EB are people aged 45+
Opolskie		9.3	100% EB are people aged 45+
Podkarpackie		9.3, 9.4	100% EB are people aged 45+
Podlaskie		9.3, 9.4	Min. 50% EB are people aged 45+
Pomorskie		9.3	Min. 50% EB are people aged 45+
Śląskie		9.3	Min. 40% EB are people aged 45+, the projects provides for support tailored to the needs of individual participants of this age
Świętokrzyskie		9.3	Project ensures the use of model training programmes for people aged 50+, designed on basis of validated results of EQUAL CIP
		9.4	Min. 50% EB are people aged 45+
Warmińsko-mazurskie		9.3	Implementation of projects aimed at people aged 45+
Wielkopolskie		9.3	Min. 50% EB are people aged 45+
Zachodniopomorskie		9.3	100% EB are people aged 45+
		9.4	Min. 20% EB are people aged 45+

Markings — as in Tabl. II.12.

Source: Priority IX Action Plans in 2007–2008 and in 2009 for individual voivodeships.

The action plans for 2009 **Priority IX Development of education and competence in regions** under Measure 9.3 “Promotion of formal lifelong learning in school forms”, and Measure 9.4 “Highly qualified staff of the educational system” set access and strategic criteria of selecting projects, on the basis of which almost all voivodeships rewarded projects involving people aged 50+/45+. Each voivodeship allocated individually what percentage of the target group should be aged 50+/45+. The largest, 100% share of this group of people was required for projects implemented in the **Zachodniopomorskie and Opolskie Voivodeships**; high participation was also required in Lubuskie (at least 80% of the target group are people aged over 45). Only in the Małopolskie Voivodeship guidelines in the form of access criteria and the criteria for selection of strategic projects addressed directly to a group of people aged 50+/45+ were not specified, which probably had a significant impact on the lack of projects for this age group, completed under this priority in this region (compare with Fig. II.13)

Strategic and access criteria, presented in the action plans, preferring people aged 50+/45+ as a target group, undoubtedly had an impact on the implementation of projects under the HC OP, which is shown in the next section by a quantitative and qualitative analysis of our own research conducted among the beneficiaries and Intermediate Bodies implementing projects of HC OP.

### 6.3. Features of HC OP projects completed in 2007–2009 directed at economic activation of people aged 50+/45+

Analysis of the SIMIK<sup>50</sup> database and our own research conducted among beneficiaries and Intermediate Bodies, implementing Human Capital projects, has shown 221 projects completed in 2007–2009, which involve the target groups of people aged 50+/45+ in the context of equalising their chances on the labour market (i.e., people aged 50+/45+ accounted for at least half of their participants). These were the only projects with a regional component implemented in all voivodeships under the Priorities VI-IX (see Figure II.13).

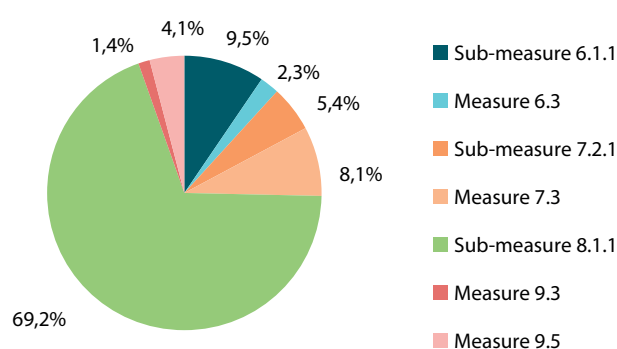


Figure II.13. HC OP projects aimed at people aged 50+/45+ according to area of intervention and the number of initiatives

Source: Own study based on the SIMIK database and project charts.

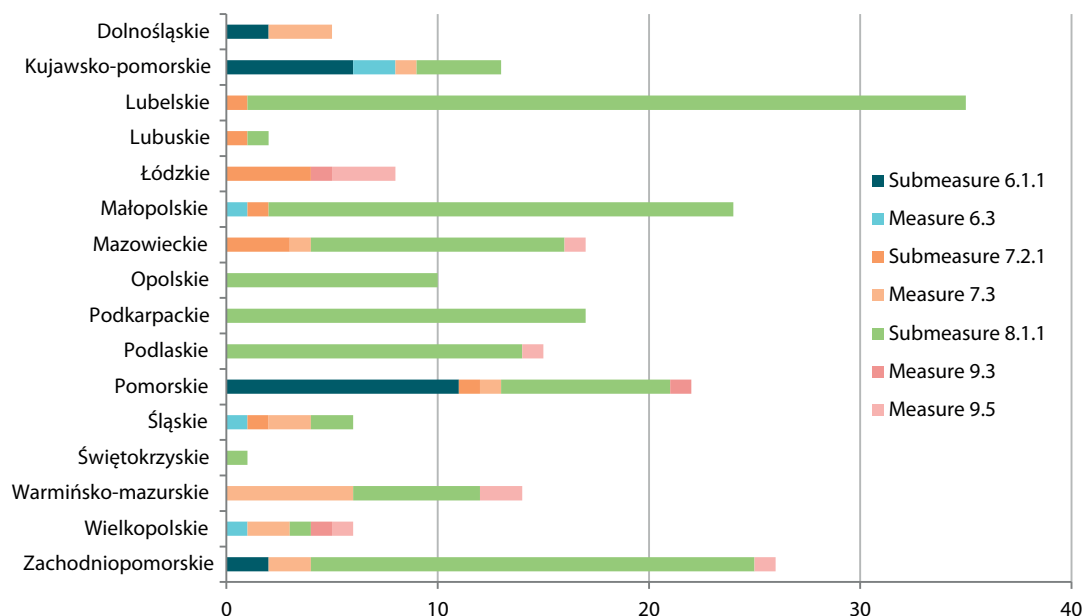
A large part, because about 70% of the projects addressed at people aged 50+/45+, has been completed as parts of Priority VIII „Regional human resources”, of Human Capital Operational Programme, which is associated with the access criteria and strategic criteria for selection of projects contained in actions plans for this Priority and numerous pilot projects already completed in 2007. Two main areas of intervention (Sub-measure 8.1.1. „Supporting the development of professional skills and consultancy services for enterprises for activation of mainly working people”, and Sub-measure 6.1.1. „Support for the unemployed in the regional labour market”) in the structure of projects aimed at increasing the level of economic activity and the ability to employ the unemployed.

As it has already been stressed, the subject of analysis were only those projects that **ended not later than 31 December 2009**. Taking into account the different publication dates of competitions by various intermediaries, this has a definite influence on the geographic distribution of projects targeted to people aged 50+/45+, which are the subject of further conclusions. Analysis in such terms cannot therefore be understood in terms of “better/worse”, and is only a quan-

<sup>50</sup> SIMIK — Computer System of Monitoring and Financial Control of Structural Funds and Cohesion Funds is designed to ensure proper, efficient and transparent management of European funds under programmes financed by the European Union. The functioning of the system involves electronic transmission of data from local systems to a national system.

titative assessment of the current activities towards the equalisation of opportunities for people aged 50+/45+ in Poland.

The most projects were completed in voivodeships of Lubelskie (35), Małopolskie (27), Zachodniopomorskie (26) and Pomorskie (22). They accounted for almost half of all projects aimed at people aged 50+/45+ implemented in 2007–2009 in Poland (see Figure II.14.).



**Figure II.14.** The number of projects aimed at people aged 50+/45+, implemented in 2007–2009 under HC OP according to voivodeships and the area of intervention

Source: as in Fig. II.13.

It is worth noticing that in the Lubelskie Voivodeship in which the duration of unemployment of people aged 50+/45+ (especially women) are among the highest in Poland (see Chapter 1), the beneficiaries have demonstrated both high activity and effectiveness in the use of EU funds under the HC OP. This may indicate a good adjustment of regional labour market policies to the needs existing in this voivodeship.

On the other hand the low number of subject projects in some voivodeships was largely due to the failure to sufficiently take account of needs of the target group of people aged 50+/45+ at the stage of scheduling for these voivodeships for the years 2007–2009.

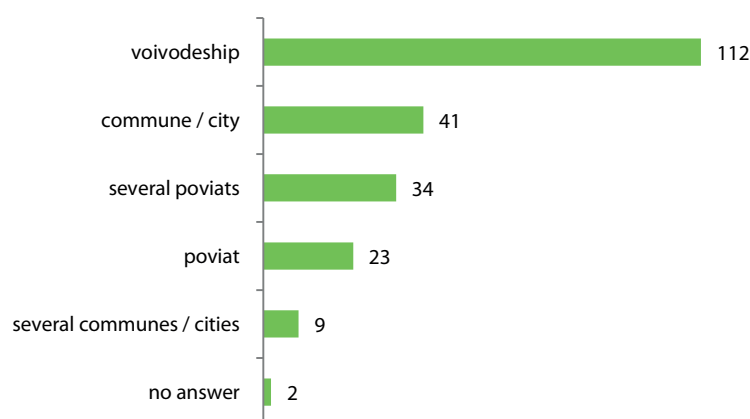
Limiting the directory of participants to one category, such as people aged 45+, is reluctantly practiced by designers. Therefore, a greater inclusion of people aged 50+/45+ in current training projects organised requires incentives for institutions in the form of access criteria and/ or strategic criteria, taking into account people from this age category as widely as possible. It would also be worthwhile to include in the above mentioned criteria a condition relating to the forms of support tailored to the needs of people aged 50+/45. A good solution, already used by some intermediaries, might be the mandatory use of the EQUAL CIP results (which was mentioned in Chapter 5 of this publication) in projects of HC OP.

Among the projects addressed to people aged 50+/45+ predominant are the ones focused on a voivodeship (about 50%), less frequently on a powiat, a town or a commune (see Fig. II.15.).

Projects of smaller territorial range were implemented especially within the framework of the Measure 7.3 “Local initiatives for active integration”, and Measure 9.5. “Independent local educational initiatives on rural areas” (about 90% of them concerned one commune or town). On the other hand, within the framework of basic, from the perspective of people aged 50+/45+, Sub-measure 6.1.1. „Support for the unemployed in the regional labour market” and 8.1.1. „Sup-



porting the development of professional skills and consultancy for businesses” the areas were — respectively — one poviát (40%) and the whole voivodeship (ca. 64%).



**Figure II.15.** The number of HC OP projects completed in 2007–2009 and aimed at people aged 50+/45+ according to the territorial range of interventions

Source: as in Fig. II.13.

If the area of action is only a voivodeship, it enables a larger group of people to participate in the project, but on the other hand, such a wide geographical presence can cause the project not to be adjusted enough to the needs of people living in small areas (e.g. a commune, a poviát). In turn, the presence of a significant percentage of projects implemented in the area of a commune/a town may show that the activity is better suited to the directions of the development of a region (as it happened in Wielkopolskie, Warmińsko-mazurskie, Łódzkie and Dolnośląskie voivodeships).

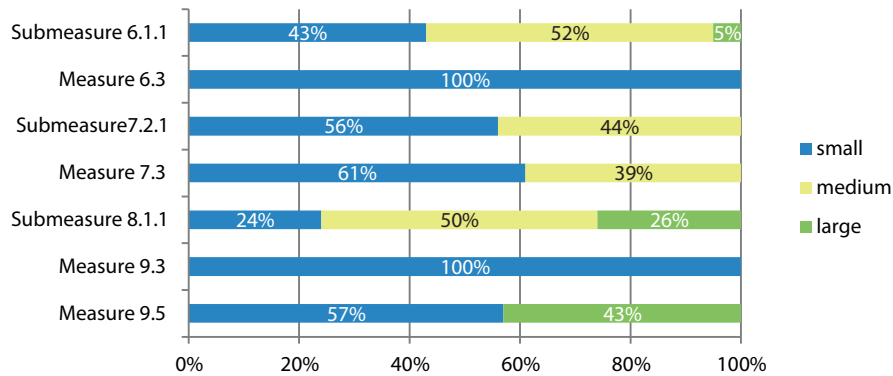
The surveyed projects belonged exclusively to the competition category; among them there were no innovative and transnational projects, and only 20 projects were implemented in partnership. The partners were mainly private businesses, NGOs, commune and poviát offices.

The average value of the examined projects was approximately 500 thousand PLN, most projects had value close to the average, and only a few could be treated as large (their value exceeded 1 mln PLN). Average completion time is about 12.5 months, so the vast majority of examined projects are annual ones, and short projects, 3–4 months long, or long ones — 24 months long accounted for a small group.

Analysis of target groups (participants) in the surveyed projects showed that 91.4% of projects were directed exclusively to people aged 50+ or 45+, and **in approximately 65% of projects the only target group were people aged 45+**, while in **26%** of these the target were **only those aged 50+**. The number of participants in surveyed projects<sup>51</sup> depended mainly on the intervention area, as well as its territorial range (compare Fig. II.16. and II.18.)

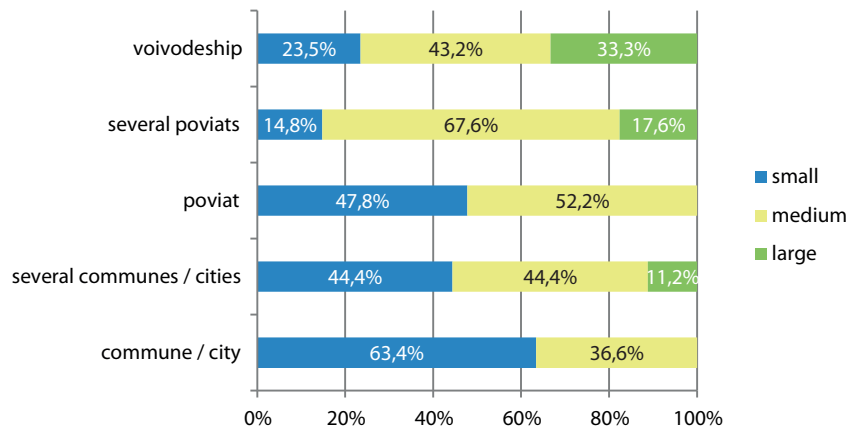
Projects with the lowest number of target groups have been implemented in small towns and rural communities, primarily within the framework of Measure: 6.3. „Local initiatives to raise the level of economic activity in rural areas”, and 9.3. „Promotion of formal lifelong learning in school forms”. The largest target groups were included in projects under the Measure 9.5. „Independent local educational initiatives on rural areas” and 8.1.1. „Supporting the development of professional skills and consultancy to enterprises for activation of mainly working people”, which in most cases concerned entire voivodeships. The arrangement of projects according to the size of the target groups is particularly important for projects to reach a wider audience and to adjust the actions implemented under the project to the individualised needs of participants.

<sup>51</sup> Size categories of the project were established on the basis of the arithmetic mean and the standard deviation of the number of participants. Limits of the range were established by the following indexes: the arithmetic mean  $\pm$  2 standard deviations. This means that in the case of small projects, the size was up to 47 participants, average — 48 to 137, and large — above 137.



**Figure II.16.** The size of HC OP projects targeted at people aged 50+/45+ according to the support area in 2007–2009  
Source: as in Fig.II.14.

**Figure II.17.** The number of participants in projects aimed at people aged 50+/45+ according to the territorial range of interventions in 2007–2009



Source: as in Fig.II.14.

Detailed analysis of projects completed in 2007–2009 within the framework of HC OP allows to organise them according to the aforementioned five themes: (i) raising the qualifications of employees aged 50+/45+, (ii) the economic activation of the unemployed aged 50+/45+, (iii) promoting flexible forms of employment — to reconcile family and professional life, (iv) promoting lifelong learning, (v) increasing the active life of seniors.

Implementers of these projects were primarily private entities (including NGOs), regional development agencies, universities, commune offices and poviat employment offices. The participants were primarily employed people, often with low levels of education, living in small towns and rural areas, usually distant from educational institutions, employees of various sectors and industries (including health care, social welfare, food industry, local administration, NGOs, educational administration, the tourist sector, the banking sector), as well as the lowest-level managers working in companies which are diversified in terms of size. The main objectives of this group of projects, specifically aimed at raising the skills of the employees and the economic activation of the unemployed, closely correspond to the main assumptions of the Human Capital Operational Programme and Regional Action Plans for Employment (discussed in Chapter 3 of this publication). In most cases, these objectives relate directly to people aged 50+/45+ and are associated with an increase in the level of skills and qualifications of workers (particularly women), the maintenance of labour market activity by people working in the age group of 45+, the stimulation of social activity in the direction of seeking income-earning opportunities such as running

a business, and fighting unemployment with particular emphasis on preparing the unemployed to entering the labour market and returning to active professional life.

The main activities undertaken to achieve the objectives in the studied projects primarily include **widely recognised training courses, workshops, counseling and information and promotional campaigns.**

Training courses had various thematic range, most were related to the requirements of modern economy (such as IT, languages, and entrepreneurship) and responded to the needs of people aged 50+/45+ in relation to adjusting them to new conditions in terms of necessary skills and qualifications. Also specific training courses were implemented (e.g. for social workers — specialized training in first and second degree, for the banking sector — courses on the functioning of the modern banking system, courses in effective marketing of financial services, for the financial sector — i.e. courses in settling projects co-financed by the EU, training in recognition of the authenticity of Polish exchange medium and credit cards) to improve skills. Also training courses in finding alternative employment, i.e. jobs scarce on the regional labour market, were organised. A good example of such activities is a project implemented on the Małopolska market “Take care of your future — skill improvement training for people over 45 years of age”, under which a number of professional training courses were implemented, such as operating earthmoving construction machinery and operation of numerically controlled devices, tailored to the needs of socio-economic development of the region. There were also classes on how to start a business based on acquired qualifications (e.g. under the “Become a Entrepreneur! Training for people over the age of 50” participants gained new skills in entrepreneurship, Kurpie culture and handicrafts, allowing beneficiaries to retrain and in future to open their own businesses. Another example of entrepreneurship training to prepare for running a business was the project “Activation of women over 50 in Andrychów and its surrounding area”, under which a range of vocational courses were implemented, such as classes in clothing alterations, a course for florists and a course in the basics of entrepreneurship, which may in future result in the economic activity of the participants of the project.

IT training usually included the use of computer and Internet, the practical use of word processors, spreadsheets, multimedia presentations and databases. Good examples of such projects include projects: „Modern Information Technology” and „Computer experts — improving skills of workers in Rycki and Puławy poviats”, which participants had access to IT courses with varying degrees of advancement and obtained certificates of completion of ECDL (European Computer Skills Certificate). Language training, mostly in English, were the most common complement to the training offer. Example projects are “Better @ future” and “Lublin Academy of Competence”.

Training on offer often consisted of several thematic modules, which is exemplified by the project „New competences, new skills as a path to professional success”. Within its framework five modules were completed, namely English, „the computer and I”, self-presentation and communication, coping with stress and work organisation and entrepreneurship. In turn within the project „New qualification as a path to success”, 3 modules were completed, i.e. the vocational training courses: hotelier or a nurse for the elderly, English language, ABC of entrepreneurship. This allowed participants to gain a comprehensive knowledge in the given field. New skills acquired in the course of training may have contributed to the empowerment of participants in the current workplace, and increase in self-esteem and effectiveness in presenting their knowledge and experience.

Training courses preceded by an analysis of the professional situation of the participants, which enabled the development of an individual action plan (IPD) and the proper selection of professional training, proved to be good solution. An example of such an initiative is the „Women 45+” project, the implementation of which began with classes taught by a coach — a career counselor; their aim was to analyse the situation of each of the participants, and then to prepare a plan for further development and select vocational training in accordance with the chosen development path.

In summary, the thematic range of training was very extensive and tailored to the needs of different categories of target groups. For example, women were offered, among others, florist

courses, sewing classes, courses in makeup techniques, styling and image building, or care cosmetology basics, and men e.g. driving classes in C, D, C + E categories, forklift operating or welding courses.

A significant number of specialist training was directed to specific professional groups, such as health care, local government employees and government, treasurers, confectioners, accountants, representatives of the food industry and tourism. For example, in the „Sisters for good and bad — professionalization of nurses over 50” the following training blocks have been implemented: emergency assistance in urgent states, health promotion, health education, „Psychological aspects of nursing”, workshops, the completion of which gave new knowledge and skills to increase qualifications within the profession of nurse and midwife, and the thus increasing the chance of staying in employment. Under another project, „Raising the qualifications of Małopolska food industry workers”, a specialized training in HACCP system and agricultural contracting, and modern computer techniques was implemented, which allowed the participants to perform the duties of HACCP specialists and specialists for contracting produce.

Training courses were conducted mostly by traditional methods, and had the form of courses and stationary workshops, but there were cases of training assisted by IT tools in the form of e-learning, a good example of which is the project „Opolskie, I work here! Matching skills of working people over 45 to labour market needs” (in which the „Accounting for small business” part of the training, (2 groups of 10 people, 50 hours) with the consent of the participants was held in the form of e-learning courses on a distance learning platform. This method of education proved to be particularly important for people possessing a limited time for training, allowing them to learn at a time convenient for them, and thus to manage their own time. E-learning also ensures the individual learning process by adjusting the scope, intensity, pace and the level of material to the needs of a participant, which is especially important for people aged 50+/45+. In another project, „Self-governed in learning — e-learning for employees of local government”, addressed to the employees of local government units over 45 years of age with lower education, the participants increased their professional competences, which enabled them to perform additional functions in the commune centres of crisis management, commune information centres, customer service offices, etc. The implementation of this project was assisted by distance learning methods which developed in participants such qualities as self-reliance, self-confidence, creativity and willingness to take on new challenges.

In case of projects targeting the unemployed the training courses were often accompanied by activation workshops, aimed at raising the level of self-presentation skills (conducting interviews, writing CVs and cover letters), interpersonal skills (assertiveness, managing a team, moving into the labour market) and the dissemination of flexible forms of employment (teleworking, the ability for self-employment, part-time work). This is especially important for people who lost their jobs after having worked in the same place for a long time, even decades. An example of such initiative is the „I can still do much”. Another range of trainings was completed under the „Reach the zenith of your abilities” programme. Courses implemented under the project were preceded by workshops and cooperation with a professional advisor in order to build an individualised action plan for each participant; and on the basis of the established plan further training modules were chosen individually, such as human resources, payroll, workplace safety, customer service, computer, forklift operator. It is important to remember that people aged 50+/45+ are often distrustful towards any kind of study, and thus the diagnosis of their needs may face barriers (Znajmiecka-Sikora, Roszko 2010, p. 60). Therefore the development of IAP (Individual Action Plan) should be conducted with special care to preserve confidentiality and ensure appropriate conditions for making a diagnosis. This applies especially to men.

Important actions addressed to people aged 45+ / 50+ are also initiatives implemented by social welfare agencies (SAA), which are and may continue to be major beneficiaries under the different priorities of HC OP. Particularly noteworthy are two projects implemented in the examined period by social welfare centres (SAC), i.e. the „Together for themselves, together for others” project (Sub-measure 6.1.1.) and „In every old age there is a spark of youth” (Measure 7.3.).

The first of these projects was implemented by the City Social Welfare Centre in Gdańsk, and attended by unemployed people aged 45+. The main aim was to increase the activity of these people by adjusting their skills to the labour market requirements through such activities as psychological support and professional mobilization as well as implementation of vocational training.

The second of these projects was not related to the economic activation of people in the non-mobile working age, only to social inclusion and was aimed at strengthening the ties among the seniors in Łęka Opatowska community through common active spending leisure time, developing interests, updating knowledge, and general activation of economically inactive seniors' life. This project was implemented by the Municipal Social Welfare Centre in Łęka Opatowska, and its beneficiaries were people aged 55+. Its goal was achieved through meetings with a nutritionist, gerontologist, computer specialist, sports instructor, and professional actors, which enabled the senior milieu to integrate by offering them various forms of activity. These projects belong to the few support initiatives aimed at people aged 50+/45+ completed within the HC OP by the organisational units of social welfare.

As is clear from these trials, the expected „hard” and „soft” results have been completed in most of the HC OP projects (note that in this group 219 projects were identified and analysed<sup>52</sup>). Possible lack of attainment of the assumed values was primarily due to problems in recruiting participants, e.g. in the case of language courses the additional limiting criterion was having no more than secondary education (as is clear from studying project documents and interviews with employees of Intermediate Bodies, people in this group often consider language learning as superfluous, and the same applies to computer training, especially those organised in rural areas). Another reason for failure to achieve 'hard' results was insufficient knowledge of the participants to obtain a certificate. This happened most often in the case of foreign languages, e.g. in the case of language training with TELC certificate. In some cases the problem appeared to be the resignation of participants during the project, due to, for example, finding a job or for no reason at all.

The opinion of the beneficiaries is that as a result of projects the expected „soft” results, such as increased motivation to take up employment, increased self-esteem, development of skills to adapt qualifications to the changing labour market requirements, increased awareness of the benefits of lifelong learning, and increased assertiveness, have also been achieved. These are particularly important for people aged 50+/45+, because they clearly improve their difficult situation on the labour market and make it possible to break the stereotypes of these people as less economically active. Participation in the projects allowed the end beneficiaries to gain new skills or to supplement professional qualifications related to their profession and to break the passive attitude to their own careers. It has increased their professional and personal aspirations, rekindled their motivation for self-education and improved self-confidence.

The support which was offered, such as training and workshops, was tailored to the needs of people aged 50+/45+ on the given labour market and filled the gap in the regional offer of education and professional training. Beneficiaries participating in the projects had the opportunity to develop their interpersonal skills and acquire key competencies sought in the regional labour market. Participation in the projects contributed to overcoming obstacles such as lack of knowledge related to computer technology and foreign languages, and helped eliminating barriers faced by people at risk of professional marginalization (mental and psychological barriers).

Participation in projects of HC OP has also contributed to supporting social activity of the beneficiaries, which if not immediately, then in the future, can help in economic activation, and thereby increase the chances of people aged 50+/45+ for development in their own workplace and extension of the period of economic activity by adjusting skills and competencies to the needs of regional employers.

<sup>52</sup> Information on assumed and completed results came mainly from the beneficiaries of projects, from project documents (Application Form and Beneficiary Final Application for Payment), and information obtained from employees of the Intermediate Bodies. Research has shown that the Intermediate Bodies do not always monitor the implementation of the non-mandatory indexes, but the information obtained from the IB staff indicated that the assumed indexes were met.

## 6.4. SWOT analysis of the projects completed as a part of HC OP

On the basis of conducted surveys a SWOT analysis of projects was prepared (Table II.16). This analysis was used to assess the effects of involvement of projects completed as a part of HC OP related to activation of people aged 50+/45+ in the labour market and to formulate final conclusions and recommendations.

**Table II.16.** SWOT analysis of the projects completed as a part of HC OP in 2007–2009 addressed to people aged 50+/45+

Strengths	Weaknesses
<ol style="list-style-type: none"> <li>1. Strong interest of beneficiaries in offered training, especially in the field of vocational courses.</li> <li>2. Achieving the vast majority of results anticipated in projects.</li> <li>3. Adjusting the training offer to the needs of beneficiaries.</li> <li>4. Adjusting the level of training courses in, among others, languages and computer science, to individual skills of participants, e.g., the possibility of choosing various levels of advancement of a course.</li> <li>5. Training consisting of several thematic modules allowed to acquire comprehensive knowledge in a given field.</li> <li>6. Training preceded by an analysis of employment situation enabled participants to develop an individual action plan and select proper vocational training.</li> <li>7. Improving skills and acquiring new skills may lead to project participants increased economic activity and employability of people aged 50+/45+.</li> <li>8. Activation of older people — increasing the participation of seniors in social and cultural life.</li> <li>9. Increasing knowledge and skills in modern computer and communication technology by participants of training courses may contribute to the growth of economic activity and improve the chances of employment for people aged 50+/45+.</li> <li>10. Acquiring knowledge and skills in entrepreneurship within the framework of ongoing training and workshops may lead in future to people aged 50+/45+ working on their own account.</li> <li>11. Increase in linguistic competence and skills in information technology of people aged 50+/45+.</li> <li>12. Opportunity to gain certificates confirming acquired skills, such as Certificate of TELC, Autocad.</li> </ol>	<ol style="list-style-type: none"> <li>1. Sometimes too intensive and material heavy training programme proved to be very hard on some participants, particularly those working.</li> <li>2. Dividing activities implemented under single projects into various, often poorly, related activities.</li> <li>3. Problems with recruiting participants, especially among people of low level of education.</li> <li>4. Resignation of participants in the course of implementing the project, which creates the necessity of additional recruitment.</li> <li>5. Lack of specified actions addressed only to this group of beneficiaries.</li> </ol>
Opportunities	Threats
<ol style="list-style-type: none"> <li>1. Clear separation of the age group 50+/45+ as a preferred one in the programme, which will allow to focus the greater part of the support on it.</li> <li>2. Increasing participation of people aged 50+/45+ in the process of learning and the promotion of lifelong learning.</li> <li>3. The possibility to use the knowledge gained by the beneficiaries to continue self-education.</li> <li>4. Popularization of e-learning, allowing easier access to training offer, among people aged 50+/45+.</li> <li>5. Preparing people aged 50+/45+ to working in new professions.</li> <li>6. Increasing motivation of project participants to further their education.</li> <li>7. Popularization of flexible forms of employment.</li> </ol>	<ol style="list-style-type: none"> <li>1. Too few activities included in the priorities of the programme addressed directly to the group aged 50+/45+, which may cause less financial support for this target group.</li> <li>2. Implementation of economic activation projects which do not meet the real needs of local labour markets.</li> <li>3. Deepening social exclusion, which for people threatened by such phenomenon means difficult return to the labour market and reluctant attitude to activation.</li> </ol>

Source: Own study based on HC OP project charts.

## 6.5. Conclusions and recommendations

The analysis leads to the following conclusions and recommendations:

1. The Human Capital Operational Programme lacks direct action targeting the age group 50+/45+; it is only specified as the preferred target group in the access criteria and the criteria contained in the strategic action plans for 2007–2008 and 2009.

**It is recommended** to put clear emphasis, both in the access and strategic criteria for projects implemented in the current and the next programming perspective, on the fact that people aged 50+ /45+ are the target group, and to specify direct actions for this age group in programme documents.

2. Participation in projects improved access to employment for people at risk of social exclusion by improving their performance and reducing barriers to employment.

**It is recommended** to promote the idea of lifelong learning and flexible forms of employment, which to some extent will help activate people aged 50+/45+ and prevent social exclusion.

3. Among the most popular training courses offered in examined projects were courses preparing to performing specific jobs or starting private business, and economic activation workshops. This is a good choice of range of activities undertaken in the projects in order to stimulate people threatened by exclusion from the labour market due to age.

**It is recommended** to include employers in the process of economic activation of people aged 50+/45+, which will help to adjust the training and consulting offer to the needs of local labour market and increase the chances of those people for finding jobs.

4. The training courses on offer are diverse in terms of subject matter, audience, as well as training methods. In most cases they are tailored to the needs of beneficiaries and in accordance with the needs of local labour market, which may allow to supplement **the skill** gaps in the regional labour market, contributing to economic activation of persons aged 50+/45+. In most cases training courses made use of innovative and original programs and materials, but employed mostly traditional methods.

**It is recommended** that offered training methods were adapted to the local labour market, employers' expectations, and took into account individual needs and capabilities of people aged 50+/45+. It is also important for the learning process to be supported by *e-learning* and *blended learning*. This will affect positively the use of new technologies in the educational process, which is in line with economic trends and assumptions of Europe 2020 strategy.

5. Among the project promoters the activity of Organisational Units of Social Welfare is barely visible, which is mainly due to problems in applying for funding from the EU, including the HC OP. The reason for this state of affairs can be ascribed to insufficient skills of OUSW staff in preparing grant applications, in unclear guidelines and lack of financial resources in these units.

**It is recommended** that greater use be made of the possibility of applying for funding under the HC OP by institutions of social assistance and social integration. To meet this challenge the individual social welfare units (especially MOPS, MGOPS, GOPS) require support for improving the competence of the staff responsible for raising funds from the ESF, through training and workshops on skills in the filing of applications in accordance with the instructions and other guidelines that affect the quality of applications. Also additional funds should be allocated for hiring staff in institutions of social welfare, which will enable the creation of organisational units involved in raising funds.





# Chapter 7

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## Financing initiatives related to activity of people aged 50+/45+ in Poland within international programmes

### Introduction

- 7.1. Analysis of support to equalisation of opportunities for people aged 50+/45+ as a part of Framework Programmes
- 7.2. Analysis of support to equalisation of opportunities for people aged 50+/45+ as a part of the Lifelong Learning Programme
- 7.3. Analysis of support of equalisation of opportunities for people aged 50+/45+ as a part of Norway grants
- 7.4. Conclusions and recommendations

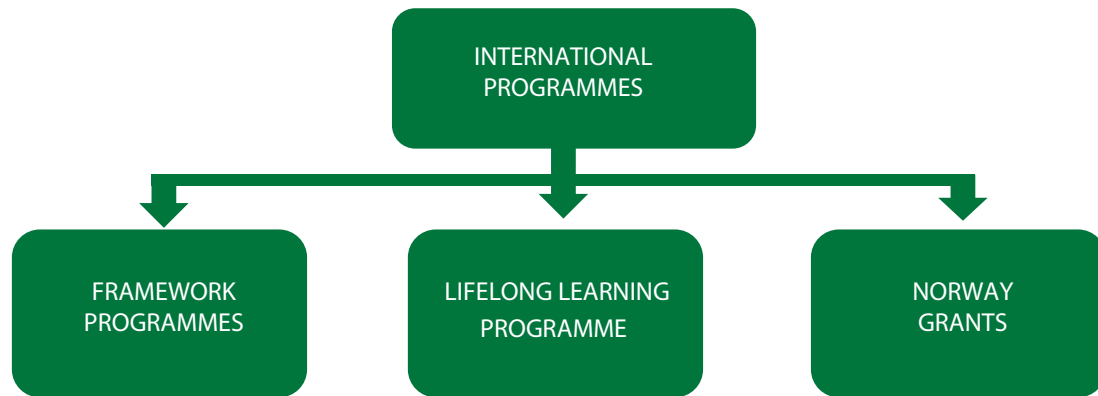


## Introduction

The aim of the research undertaken in this area was identification, analysis and evaluation of projects implemented in Poland in 2004–2009 under the programs of international character, co-financed from European funds. The subjects of analysis were the Framework Programmes (V, VI and VII), Lifelong Learning Programme (LLP — The „Learning for life”) as well as the Norwegian Financial Mechanism projects and the Financial Mechanism of the European Economic Area in 2004–2009.

By reading the chapter the readers will have the opportunity to examine potential funding initiatives aimed at activating people aged 50+/45+ created by programs with international dimension. They will also be presented with examples of initiatives implemented in this area.

Among initiatives which could promote professional or general activation of people over 45 years of age, included in international programs, one can mention projects of research character implemented under Framework Programmes, „Norwegian” projects with local and social dimension, and educational projects focused on lifelong education. (see Diagram II.3).



**Diagram II.3.** International programmes, under which the actions conducive to equalising opportunities to people in non-mobile age were financed

Source: Own study.

### 7.1. Analysis of support to giving equal opportunities to people aged 50+/45+ as a part of Framework Programmes

According to the „Strategy for smart, sustainable and inclusive growth — Europe 2020”, the European Union has five measurable objectives: employment, research and innovation, climate change and energy, education, the fight against poverty. In particular these priorities: Smart growth (development of knowledge and innovation based economy) and inclusive growth (strengthening economy characterized by high employment and economic, social and territorial cohesion) are becoming extremely important for institutions undertaking research on the situation of the elderly (European Commission, COM (2010) 2020FINAL).

Framework Programmes are one of many available streams of research funding in Europe. After the Common Agricultural Policy and Structural Funds they are currently third in the European Union budget.

**The Fifth Framework Programme (VFP)**, completed in 1998–2002, consisted of: five theme programmes, three horizontal programmes and other programmes, including the Joint Research Centre and the Centre for Information on Scholarships. The aim of the programme was to assist

in solving problems and responding to major challenges currently facing the EU. The programme had several objectives combining technological, industrial, economic, social and cultural aspects of the functioning of the EU.

**VI Framework Programme for Research and Technological Development (VI FP)**, implemented in 2002–2006, was a continuation of a series of activities to help develop the scientific and research environment in the European Union. The main objectives of the PR VI were: such the development of the European economy, that in 2010 it would be the most competitive, economy in the world, based on knowledge, and to create a European Research Area. Under the VI FP there was an opportunity to participate in projects of various types. The budget for research projects in the VI Framework Programme was 17.5 billion EUR and has increased more than five-fold compared to the I Framework programme.

Tasks in the VII Framework Programme (VII FP) are scheduled for implementation in the seven-year period of 2007–2013, with a budget of about 54 billion EUR. The VII Framework Programme brings together all EU initiatives related to research and plays a key role in achieving the objectives of growth, competitiveness and employment, along with the new Framework Programme for competitiveness and innovation, education and training programs as well as structural and cohesion funds for the convergence and regional competitiveness. It is also the main pillar of the European Research Area. In the extensive range of VII PR targets the following four categories were specified: Cooperation, Ideas, People and Capacities. All specific programs cooperate to promote and support the creation of areas of (scientific) excellence. It seems that particularly the **VII Framework Programme** can support people over 50 age of the labour market, in keeping with the **priorities of promotion and supporting widely understood activation and cooperation**. The following components deserve particular emphasis in the context of seniors:

- *Cooperation* — promoting international research cooperation in the field of health, or socio-economic sciences and humanities
- *Ideas* — promoting the most creative and innovative ideas in all fields of knowledge (basic and applied research)
- *People* — Quantitative and qualitative strengthening of human potential in research and technological development in Europe and to encourage international and cross sector mobility.

## Projects financed under Framework Programmes

Projects financed by the three Framework Programmes: V, VI and VII, were reviewed during the research. This allowed to find 36 framework projects, in which a Polish institution was the partner or coordinator, and the subject matter related the activity or expansion of professional competence. Only three of them were identified as being in the interest of the project Equal opportunities in the labour market for people 50+ for the 2004–2009 time perspective, which this publication is a part of. **Case studies** of these projects are presented below.

### Description of case 1

Project name	ACTIVAGE — <i>Overcoming the Barriers and Seizing the Opportunities for Active Ageing Policies in Europe</i>
Institution implementing the project in Poland	The Jagiellonian University, Kraków
Project financing source	V Framework Programme
Project value	1 139 996 EUR
Date of implementing the project	1.11.2002 — 31.10.2005
The scope of project implementing	Europe <i>The Interdisciplinary Centre for Comparative Research in the Social Sciences</i> from Vienna was the coordinator of the project. Partners were from 9 European countries: Finland, Germany, Great Britain, Switzerland, Norway, Czech Republic, France, Italy and Poland.

## Project description

The overall objective of this project was to identify and analyse the socio-institutional, **economic and political realities** in face of implementation of policy of active aging in Europe.

Specific objectives of the project were to enable the production of:

- A picture of socio-institutional, economic and political reforms for active aging,
- Analysis of resources and tools used in the implementation of policies for active aging,
- A comparative analysis of arrangements operating at the level of state, business and civil society and the various policy areas (labour market, pensions, health) in European countries,
- A list of ways of overcoming barriers and goals achievable through coordination of various policy areas and levels of management.

## Result

The result of project activities were:

- Preparing and publishing of **17 thematic publications**,
- Implementation of transnational workshops,
- Organisation of seminars and conferences.

Thanks to the implemented actions the following research conclusions were formulated:

1. The solutions proposed by the paradigm of „productive aging” are short-sighted and inadequate. According to an alternative paradigm of „active aging” the need to promote longer working lives and to combat age-related discrimination is recognised.
2. The growing importance of the problem of aging society is widely recognised, both at the level of state policy (in government policy documents) and businesses (in the name of corporate social responsibility).
3. European labour markets are now more flexible than ever, offering much less protection of the older people and/or long-term employees, both in relation to the protection of jobs and wage growth. Such mechanisms are used by companies to facilitate layoffs, which often primarily affect seniors.
4. Pension reforms do not take into account the preferences of employees who are in favor of shorter, not longer careers, and a more flexible pension scheme. However the proposed extension of professional life must be seriously examined.
5. The main challenge for European health care systems in recent decades is the problem of coping with the growing needs of caring for the elderly and the promotion of preventive medicine.

## Description of case 2

Project name	TLM.NET — <i>Managing Social Risks Through Transitional Labour Markets</i>
Institution implementing the project in Poland	Mikołaj Kopernik University in Toruń
Project financing source	V Framework Programme
Project value	699 975 EUR
Date of implementing the project	1.12.2002 — 31.03.2006
The scope of project implementing	Dutch Institute of Social Sciences (SISWO) in <i>Amsterdam</i> was the project coordinator. Partners came from 11 European countries: Belgium, Hungary, Ireland, Poland, Great Britain, Sweden, Italy, France, Germany, the Netherlands, Austria and Canada.

## Project description

At the core of the project was the intention to contribute to **modernizing the European social model**. The researchers faced a number of important goals, including the following:

- Examining the possibility of modernizing basic European institutions such as unemployment insurance, continuing education, family and pension systems;
- Finding new combinations of policies acting more effectively than traditional ones, assigned to specific areas of social life or work policy;
- Performing analysis of European social models.

## Results

As a result of the research project **dozens of thematic papers** were published and **several conferences** were held. In the light of the completed research on programs it was found necessary to **depart from the culture of the early retirement age**, still functioning in the early nineties of the 20th century in many EU member states. “Active retirement”, new solutions for pension schemes resulting from the demographic change and the need for comprehensive measures relating to both supply and demand in the labour market, going far beyond the still popular approach in Europe, focusing on financial incentives to retire, was outlined as a challenge for European economies. The study of TLM.NET also indicated the great importance of lifelong learning, particularly in respect to new technologies as an instrument to overcome the main problem of employees of this age group — the pay gap. Bridging the pay gap is essential in the context of an active policy of eliminating the trend of early retirement. As it is clear from the research, the emphasis on providing “better jobs” can have a clearly activating, positive impact on a group of older people. A model of the transitional labour market (TLM), which starting point was the departure from the full-time employment (Schmid, Schömann 2003), was indicated as an important element of shaping the employment policy. This model has evolved, inter alia, through the work of TLM.NET project. Currently, transitional labour markets are the backbone of a new model of social democracy (Gazier, Lechevalier 2006).

## Description of case 3

Project name	TRIPLE E-DOSE — <i>Days of Socio-Economy: Education, Employment, Europe</i>
Institution implementing project	Institute of Basic Technical Problems of the Polish Academy of Sciences in Warszawa
Project financing source	VI Framework Programme
Project value	52 160 EUR
Date of project implementing	1.02.2006 — 30.04.2007
Scope of project implementing	Poland Coordinator cooperated with the Jagiellonian University of Kraków

## Project description

The overall objective, which the authors of the project set for themselves, was to **stimulate the flow of information** between scientists on the one hand, and the users and the information developed by them — on the other.

## Results

The effect of this project was summarizing the results of socio-economic research carried out under V and VI Framework Programmes, associated with socio-economic issues of education and employment in Europe. The results of the study were made available by the multifunctional website.

Also a conference took place within the framework of the project, as well as workshops focusing on the development and transfer of recommendations for:

- active ageing,
- The functioning of people with disabilities in education and in the open market,

- The quality and the elimination of inequalities in education and the labour market.

Materials from the conference were made available, inter alia, in the form of an *online* publication ([www.kpk.gov.pl/pliki/7098/triple2007pl\\_materialy\\_pokonferencyjne.pdf](http://www.kpk.gov.pl/pliki/7098/triple2007pl_materialy_pokonferencyjne.pdf)).

### What is worth disseminating?

The project was based on **previous experience** of the beneficiary — the Jagiellonian University, from the V Framework Programme. Organisational and procedural experience in framework project management proved helpful.

According to research carried out under this project, in modern societies the elderly are either no longer treated as individuals with the greatest resources of knowledge, for which further education is superfluous. They also cease to be perceived as people who do not need jobs, because they retire due to their age. Currently, attention is paid to the need for their continuous development through participation in lifelong learning. Older people should not give up educational activity, and as a result of progressive aging of the population they cannot also withdraw from the labour market too early. The discrimination of older people was identified as the main obstacle for active aging. To counteract it, the **participation of older people in public life must be promoted**, and their **role in the labour market, education system and in community life** appreciated.

All discussed projects implemented under the Framework Programmes **related to the presence of older people on the labour market in a broad sense**. At the same time the economic activity was examined in the context of health, motivation to remain on the labour market, education and improving skills, and institutional incentives. The results clearly indicated the need for a change in the approach of various stakeholders to the elderly and aging people. They should be seen as active presence on the labour market, which may contribute to building a competitive advantage or to alleviate the crisis of involvement of employees in companies. In the context of pension systems and health care the need for coordinated action at the level of Europe and the individual sectoral policies was acknowledged.

Studies on active ageing are continued by the Jagiellonian University within the framework of *Activating Senior Potential in Ageing Europe* — ASPA project, implemented in 2008–2011 as a part of VII Framework Programme.

## 7.2. Analysis of support for equal opportunities for people aged 50+/45+ in the framework of the „Lifelong Learning Programme — LLP”

„Lifelong Learning Programme — LLP” was started in December 2006. Its goal is to “support, through lifelong learning, the development of the Community as a society based on knowledge, which will provide a steady economic growth, more and better jobs and a bigger social coherence providing appropriate protection of the natural environment for future generations”<sup>53</sup>.

„Lifelong Learning Programme” is designed for years 2007–2013. LPP continues the activities fulfilled earlier by Socrates, Leonardo da Vinci, Jean Monnet, *e-Learning* and European Language Label programmes. The goal of the programme is to develop forms of lifelong learning by encouraging cooperation between educational systems of Member States. It will raise the quality and the attractiveness of vocational training and education in Europe. “Lifelong Learning Programme” consists of four Sector Programmes (Erasmus, Leonardo da Vinci, Comenius,

<sup>53</sup> Decision of the European Parliament and the European Council No. 1720/2006/EC dated 15 November 2006 establishing the framework programme for lifelong learning, OJ of the EU L 327 dated 24 November 2006, p. 48.

Grundtvig) as well as a Inter-Sector Programme (which goal is to promote European cooperation at the meeting point of the areas of operations of at least two Sector Programmes and to promote quality and transparency of educational systems of Member States) and Jean Monnet programme (<http://www.llp.org.pl/o-programie>).

„Lifelong Learning Programme” offers various education opportunities to facilitate **formal, semi-formal and non-formal education**.

Amongst the programmes of LLP, Grundtvig and Leonardo da Vinci programmes play an exceptionally role in supporting people 50+/45+ in the labour market. Especially important is Priority 4. *Learning at a later age; family and intergenerational learning* within the framework of multilateral actions of the Grundtvig Programme.

Projects realised within the framework of Priority 4 of the Grundtvig Programme are focused around:

- transfer of knowledge, methods and good practices related to senior education,
- providing seniors with abilities they need to cope with change and to remain active members of the society,
- to increase the input of older people in teaching others.

The Grundtvig Programme also includes **senior volunteer programmes**. Their goal is to support cooperation of two partner organisations from two Member States in order to organise volunteer work abroad for people 50+. Volunteer work is increasingly considered as a valuable experience of non-formal education for people at different age. It is considered an especially good way of creating learning opportunities for people 50+ throughout Europe, of promoting active ageing and underlining the social input of seniors who are an invaluable source of wisdom and experience, also in the case of the participation in professional life. Therefore, volunteer projects offer a new form of mobility for European seniors which enables education, exchange of experience and transfer of values and shaping attitudes.

**Leonardo da Vinci Programme (LdV)** offers support for the following activities (Kędzia 2010, p. 7):

- personal mobility,
- partnership concentrating around themes related to common interests of the members of the organisation,
- multilateral projects, especially those aimed at amending training systems by focusing on transfer of innovations related to language, cultural and legal adaptation to national requirements in the scope of innovative products and processes developed in various contexts,
- multilateral projects aimed at amending training systems by focusing on developing innovations and good practices,
- thematic networks of experts and organisations dealing with specific issues in training and vocational education.

### Projects financed by the „Lifelong Learning Programme”

During the realisation of the *Equalising Opportunities on the Labour Market for People Aged 50+* project 2,532 projects have been reviewed (187 Erasmus, 1,065 Leonardo da Vinci and 1,280 Grundtvig). Among those, 12 projects were identified to fulfil both criteria: one of the partners was a Polish institution and the exclusive of dominant beneficiaries — people 45+ (see Table II.17). All LLP projects analysed have been realised within the framework of the Grundtvig Programme.



Table II.17. Projects realised by Polish institutions within the framework of the Lifelong Learning Programme (LLP), addressed to people in immobile age

Project name	Institution realising the project in Poland	Partner States	Beneficiaries	Main operations	"Hard" results	"Soft" results
Keep employment by developing e-skills	The University of Humanities and Economics in Łódź	Poland, Portugal, Germany, Italy, the Czech Republic, Spain, Austria	Older workers in the SME sector — 50+	<ul style="list-style-type: none"> <li>• Testing KEMP course (<i>Keep Employment</i>) by conducting a single Europe-wide pilot course in Spain, offered to at least 24 older workers.</li> <li>• Realisation of the KEMP course thanks to funding from the Grundtvig Programme with at least 15 participants — course in English.</li> <li>• Dissemination of adult training amongst the most interested persons in the educational sector.</li> </ul>	<ul style="list-style-type: none"> <li>• IT needs analysis report, summarising questionnaires filled out by older citizens and interviews conducted with IT services suppliers.</li> <li>• Handbook describing best European practices related to methodology and pedagogy techniques developed for older workers.</li> <li>• Implementation of Europe-wide pilot course.</li> <li>• Implementation of training course.</li> <li>• DVD.</li> <li>• Brochures.</li> <li>• Bulletins.</li> <li>• Website.</li> <li>• Academic seminars.</li> </ul>	<ul style="list-style-type: none"> <li>• Increased interest in lifelong learning among older workers.</li> <li>• Decreased resistance of FB to using IT tools and services.</li> <li>• Increased opportunities of FB for finding work or promotion at the current workplace.</li> </ul>
Live English: improving English teaching for adult women	"Wiedza Powszechna" Education Association, Gdańsk	Poland, Italy, Lithuania, Finland	Addressed to women aged 25–65 the beneficiary group consisted of older ladies	<ul style="list-style-type: none"> <li>• English language course at different levels.</li> </ul>	<ul style="list-style-type: none"> <li>• English language course.</li> </ul>	<ul style="list-style-type: none"> <li>• Gaining practical speaking and writing skills in English.</li> </ul>
Economic activation of practically incapable people, unadjusted to challenges of modern labour market and society-based on knowledge	Jerzy Giedroyc Communication and Social Media University in Warszawa	Poland, Germany, France	The unemployed 40–45+ and women returning to the labour market after maternal leave	<ul style="list-style-type: none"> <li>• English language course.</li> <li>• Computer literacy course.</li> <li>• Course in legal issues.</li> <li>• Autopresentation and motivation for personal and professional development workshops.</li> </ul>	<ul style="list-style-type: none"> <li>• Development of support handbook.</li> <li>• Strategies for supporting the needs of adults willing to start education.</li> <li>• Creation of methods for providing and acceptance of competences.</li> </ul>	<ul style="list-style-type: none"> <li>• Motivation to engage in the main stream of professional life.</li> <li>• Acquisition of skills necessary for functioning in the modern labour market (incl. communication in English, computer skills).</li> <li>• Acquisition of basic knowledge of legal issues.</li> <li>• Acquisition of autopresentation skills.</li> </ul>

Project name	Institution realising the project in Poland	Partner States	Beneficiaries	Main operations	"Hard" results	"Soft" results
SISC — Senior Intergenerational Social Capital	IPEd, Warszawa	Poland, Italy	Older workers (50+), especially in pre-retirement age	<ul style="list-style-type: none"> <li>Project promotion.</li> <li>Identification and use of hidden competences of FB.</li> <li>Indicating FB the right attitude and behaviour expected from the employer.</li> <li>Cooperation with businesses in order to convince them about the significance of the emerging opportunity to use and implement the knowledge and experience of older workers.</li> </ul>	E-learning path of SISC — IT-tool addressed to men and women 50+ — enabling them to create independently a competence summary and to pursue an individualised training path in mentorship.	<ul style="list-style-type: none"> <li>Increased awareness of FB of own achievements with a special consideration for hidden competences.</li> <li>Reinforcement of older workers' will to participate in intergenerational education.</li> </ul>
<b>Continuing education and social activation of older people (mainly at the retirement age)</b>						
European guidelines for later learning in intergenerational, intercultural and ICT based settings	The University of Białystok	Poland, Austria, Ireland, Italy, Germany, Greece, Great Britain, Spain, Sweden, Slovenia	People 50+ with basic education and qualifications	<ul style="list-style-type: none"> <li>Partnership meeting.</li> <li>Workshops.</li> <li>Organisation of promotion days/campaigns which goal is to propagate the notion of continuing education.</li> </ul>	<ul style="list-style-type: none"> <li>Report on education of older people in Europe.</li> <li>Learning materials describing the methods for teaching seniors, factors influencing such teaching.</li> <li>Development of a model of workshop for older people.</li> <li>Development of project website.</li> </ul>	<ul style="list-style-type: none"> <li>Increased awareness of FB of the benefits of continuing education.</li> <li>Overcoming FB's reluctance to continuing education.</li> </ul>
Europe's Women At the Centre of Life	Zielonogórski Uniwersytet Trzeciego Wieku [Zielona Góra University of the Third Age]	Poland, Germany, Latvia	349 women aged 45+ Polish participants are the students of Uniwersytet Trzeciego Wieku [The University of the Third Age], other participants — working women	<ul style="list-style-type: none"> <li>Partnership meetings: 3 Silver Summer Schools in Preila (Latvia), in Berlin and in Karpacz; lectures (such as "Marketing for BusinessWomen", "How to Balance Business with Private Life") and meetings which goal was to develop better knowledge and understanding of intercultural differences and similarities.</li> <li>Conference.</li> <li>Seminar.</li> <li>Workshops.</li> <li>Rehabilitation tour.</li> </ul>	<ul style="list-style-type: none"> <li>Advent book which describes Christmas customs, classic Christmas recipes and Christmas dishes.</li> <li>Publication of journals and memoirs in the form of richly illustrated publication in Polish and English.</li> <li>Development of competence development scenario for people who reached the middle stage of their life.</li> <li>Project website in 4 languages.</li> <li>Meetings with presentation of participants.</li> <li>Video recording.</li> </ul>	<ul style="list-style-type: none"> <li>Increased IT skills.</li> <li>Increased social skills.</li> <li>Increased motivation and self-esteem.</li> <li>Increased knowledge of partner states and their cultures.</li> <li>Increased language skills.</li> </ul>

Project name	Institution realising the project in Poland	Partner States	Beneficiaries	Main operations	“Hard” results	“Soft” results
Golden Age	“Akademia Pemia Życia” Association, Kraków	Poland, Lithuania, Finland, Hungary, Spain, the Czech Republic	15 active students, 35 inactive students, all at the retirement age	<ul style="list-style-type: none"> <li>International meetings.</li> <li>Language meetings of the staff and participants.</li> <li>Information and discussion sessions for seniors.</li> <li>International meetings via the Internet (chatrooms), each time on different topics.</li> <li>Testing internet communication tools selected together by the group (GroupCare website, Skype, MSN, etc.).</li> <li>Project dissemination activities.</li> </ul>	<ul style="list-style-type: none"> <li>Project website.</li> <li>Bilingual informational leaflet about the project.</li> <li>Computers supplied for free by a Danish partner of the Lithuanian organisation.</li> <li>Basic computer user handbook for seniors supplied by a Polish partner and training materials to be translated and used.</li> </ul>	<ul style="list-style-type: none"> <li>Realisation of the project had a great impact on Polish participants-seniors, especially: <ul style="list-style-type: none"> <li>significantly activated and encouraged them to pursue further activities, especially internationally.</li> <li>increased their competence in using ICT.</li> <li>increased their motivation for learning.</li> <li>developed organisational skills and the ability to utilise democratic procedures.</li> <li>significantly increased their language competence and outstandingly influenced their motivation to learn foreign languages.</li> <li>increased their self-esteem and helped them fight old complexes.</li> <li>increased their will to learn about other cultures, travel and meeting other people from other countries.</li> </ul> </li> </ul>
Integrating elderly citizens into information society (IECIS)	Continuing Education School Complex, Krosno	Poland, Italy, Great Britain, Romania, France	Addressed to older people; 67 beneficiaries	<ul style="list-style-type: none"> <li>Computer literacy course in using text editors, using the Internet, including the use of e-mail for contacting other people.</li> </ul>	<ul style="list-style-type: none"> <li>Computer literacy course at different levels, adjusted to individual skills.</li> <li>Participants developed a website, exchanged e-mails, conducted discussions at internet forums.</li> </ul>	<ul style="list-style-type: none"> <li>Acquisition of practical computer skills</li> </ul>
ITAL 40+ — IT teaching to adult learners, brainstorming European ideas	The University of Humanities and Economics in Warszawa	Poland, Spain, the Netherlands, Cyprus	Only people 40+	<ul style="list-style-type: none"> <li>Course and educational material for ICT teachers.</li> </ul>	<ul style="list-style-type: none"> <li>Project website.</li> <li>Train the Trainers course in using internet and computer technology.</li> </ul>	<ul style="list-style-type: none"> <li>Acquisition of ICT skills.</li> <li>Overcoming resistance towards computers.</li> </ul>
Live English: improving English teaching for adult women	“Wiedza Powszechna” Education Association, Gdańsk	Poland, Italy, Lithuania, Finland	Addressed to women aged 25–65 the beneficiary group consisted of older ladies	<ul style="list-style-type: none"> <li>English language course at different levels.</li> </ul>	<ul style="list-style-type: none"> <li>English language course.</li> </ul>	<ul style="list-style-type: none"> <li>Acquisition of practical speaking and writing skills in English.</li> </ul>

Project name	Institution realising the project in Poland	Partner States	Beneficiaries	Main operations	“Hard” results	“Soft” results
ICT and Inter-Generation — Communication	Voivodeship Public Library, Kraków	Poland, the Czech Republic, Finland, France, Germany, Spain	People 50+ from Małopolskie Voivodeship, mainly women with higher education. In national actions, 35 people participated actively and over 100 inactively.	<ul style="list-style-type: none"> <li>• Organisation of specialist trainings and courses ensuring seniors access to new technologies.</li> <li>• Implementation and testing different teaching methods in computer skills.</li> <li>• Introduction of different activities for activation of seniors (such as Seniors' Computer Olympics, digital photography, developing multimedia presentations, editing books, Senioriada 2008).</li> <li>• Organisation of the 1 International Conference: „Seniorzy w Nowoczesnym Społeczeństwie Europejskim — nowe technologie w aktywizacji osób starszych” (Seniors in the Modern European Society — new technologies and activation of older people) (Kraków, 2009);</li> <li>• Organisation of meetings, workshops, and courses for promotion of intergenerational dialogue.</li> <li>• Two books developed by seniors, published during the project: „Młodość w mądrości przemijania” (Youth in the wisdom of passing) and „Kraków w oczach Seniorów” (Kraków in the eyes of seniors).</li> </ul>	<ul style="list-style-type: none"> <li>• Project website.</li> <li>• Multimedia presentations prepared for international meetings.</li> <li>• Publication of two books entirely developed by seniors.</li> <li>• Speeches delivered at an international conference.</li> <li>• Multimedia presentations.</li> <li>• Project activities: photo gallery.</li> </ul>	<ul style="list-style-type: none"> <li>• The effect of the training schemes is an increase of skills and interest of older people in ICT (digital phones, digital photography, Skype, chats, e-buy, e-administration, e-bank), and on this basis, social cultural, and educational activities (meetings, workshops, language courses).</li> <li>• Seniors are now considered by their surrounding as active, passionate, and knowledgeable citizens.</li> </ul>
Let's go for it: learning English to start going forward into European level	Łódzki Uniwersytet Trzeciego Wieku [Łódź University of the Third Age]	Poland, Belgium, Finland, the Czech Republic, Germany, Spain, Cyprus	Mostly people 45+	<ul style="list-style-type: none"> <li>• Computer skills courses.</li> <li>• Language courses.</li> <li>• Bilateral and multilateral exchange of project participants.</li> <li>• Partnership meetings.</li> </ul>	<ul style="list-style-type: none"> <li>• Project website.</li> <li>• DVD and CD.</li> <li>• Photo documentation.</li> <li>• Conversation courses in English.</li> <li>• Computer skills courses.</li> <li>• E-bulletin.</li> </ul>	<ul style="list-style-type: none"> <li>• Increased awareness of the existence of foreign languages (except English).</li> <li>• Getting to know other European cultures.</li> <li>• Exchange of experience in such areas as: cultural events, festivals, history of partner states.</li> </ul>

Source: Own work based on project charts and internet search (September — December 2010)

The descriptions of the projects falling within the scope of LLP, realised in years 2004–2009, offer a change to indicate the features of realised projects related to **change in qualifications and attitudes of people 50+**:

Most LLP projects are not directly related to economic activation of people 50+/45+, however, they do offer significant benefits for the participants.

1. Most of the projects identified were based on the need for raising the skills of computer literacy and internet use. Beneficiaries have considerably increased their competence in using ICT, and they have learned the basics of digital telephone communication, digital photography, internet communicators (Skype), chats, and such instruments as e-buy, e-administration, and e-banking. But most of all, those who are still active professionally understood the importance of ICT qualifications in the professional work. Participation in the project also helped them overcome resistance towards everyday use of ICT tools and services (both in their private and professional life).
2. Another important project area were language skills and their development by the beneficiaries.
3. Nearly everywhere people would stress the development of results supporting change of attitudes, habits and motivations of the participants. According to the beneficiaries themselves, participation of people 50+ in the project has considerably activated and encouraged them to pursue further activity, especially internationally, has increased their motivation to learn, and developed their organisational skills and the ability to utilise democratic procedures.
4. Project participants, who had the chance to work in the international environment, considerably increase their language skills and their motivation for learning foreign language rose as well. As indicated by projects managers, older people developed a taste for life and travel coupled with an intent to get to know other cultures. There occurred an intercultural exchange of knowledge, together with an increase in the knowledge about partner states and about the differences.
5. Participation in the project caused an increase in self-esteem and enabled the participants to fight their old complexes. A rise in self-esteem and acceptance own place in a group or local community are also important benefits from participation.
6. Participation in the project helped increase the living standard of seniors.
7. Participants of LLP projects understood the need to learn through one's life.
8. Reinforcement of older workers' will to participate in intergenerational education.

Such LLP projects, even though aimed at activation of older people who usually have already left the labour market, may cause synergy in the process of return to the labour market or to retain employment. This is supported by raising language and computer skills coupled with a broadly defined change in mentality. A similar approach appeared in Human Capital Operational Programme projects, especially in those realised within the framework of Priority IX, the goals of which, at least in some areas, were similar to those of LLP.

Effects of LLP activity have a broader scope by:

- 1) promotion of lifelong learning,
- 2) social acceptance for activities related to education of older people,
- 3) change of the stereotypical approach to older people,
- 4) dissemination of healthy and active ageing,
- 5) improvement of methods of working with older people,
- 6) development of cooperation with institutions activating older people — both Polish and foreign,
- 7) convincing employers about the importance of workers at the pre-retirement age which constitutes a basis for interest in the standards of managing age in organisations and in the long term — for their implementation.

From the organisational and reporting point of view, international projects realised within the framework of LLP can be described in the following way:

1. Project promotion was rather standard: each project had a website, usually with a photo and video documentation, e-bulletins and newsletters were distributed. Worth mentioning are interesting initiatives related to individual work of the beneficiaries on the website or internet forums, which may add to the activation and increase of recipient qualifications.
2. The most organisations willing to participate in the projects came from: Spain, Germany, Finland, Italy, and the Czech Republic. Up to 20 countries formed Partnerships, including Poland. Partnerships were different in terms of numbers.
3. In the activities of LLP, most active were beneficiaries from big cities, such as Kraków, Warszawa, Łódź, Gdańsk, but also from smaller town: Zielona Góra, Krosno, Białystok.

### 7.3. Analysis of support for equal opportunities for people aged 50+/45+ as part of Norway grants

Together with its accession to the European Union Poland has been included in the European Economic Area (EEA). This gave our country the opportunity to use financial aid of the European Free Trade Association (EFTA). EFTA donors are: Norway, Iceland and Liechtenstein; financial aid is provided through two financial instruments: Norwegian Financial Mechanism and the Financial Mechanism of the European Economic Area (EEA), jointly referred to as Norway Grants. For the years 2004–2009, Poland was assigned aid in the amount of 533.51 million EUR.

There are two main types of projects of Financial Mechanisms: individual projects and programmes. Individual projects assume the amount of aid to be applied for no less than 250,000 EUR. Programmes, being a collection of equal groups of individual projects aimed at reaching common spatial, sectoral or thematic goals, are designed to facilitate the implementation of complex and expensive enterprises.

Subject matters of projects receiving aid must cover wide-range (horizontal) issues which influence social and economic congruity. In particular: **balanced growth, equal opportunities for men and women, good management, bilateral cooperation.**

For funding from both Financial Mechanisms, according to the rules and procedures of implementation developed by donor states, can apply any institution of the public and private sector as well as non-governmental organisations, central and local government administration of all levels, academic and research institutions, trade and environment organisations, social organisations, and public and private partnership entities.

In the years 2004–2009, three calls for applications for financial aid of individual projects and programmes were organised<sup>54</sup>.

In the years 2004–2008, over 98% of Polish projects which received financial aid were individual projects (not realised through partnership). Poland has utilised over 41% out of 1,004 million EUR offered by the donors to beneficiary states by realising 290 projects co-financed by EEA funding and the Norwegian Mechanism (Figlewicz 2010, p. 2).

#### Projects financed by Norway Grants

Only two projects related to activation of people 50+/45+ realised in Poland were included in the years 2004–2009 in the framework of the so-called Norway Grants. Please find below case studies of those projects.

<sup>54</sup> The first — from 5 September until 30 November 2005, the second — from 2 January until 16 April 2007. The third call for individual projects and programmes was organised from 1 February until 31 March 2008.

## Description of case 1

Project name	Being a senior
Institution realising the project	Ustecki Uniwersytet Trzeciego Wieku [Ustka University of the Third Age] — Żyj Kolorowo
Source of project funding	Norway Grants
Project value	PLN 59,800.00
Project term	September 2007 — July 2008
Area of project realisation	City and Commune of Ustka

## Project description

The project was realised due to financial aid from the Financial Mechanism of European Economic Area and the Norwegian Financial Mechanism and the budget of the Republic of Poland in the framework of the Fund for Non-Governmental Organisations and from the City of Ustka Commune.

The goal of the project was to develop institutional opportunities of the association, to reinforce the efficiency and quality of services provided, raise the qualifications and skills of project members and staff, equip the organisation with the necessary hardware and further improve its image by professional promotional actions.

Any person at the pre-retirement age, pensioners and all other older people, regardless of their level of education, who was a resident of the City of Ustka or the rural commune of Ustka could become a student of the Ustecki Uniwersytet Trzeciego Wieku (UTW) [Ustka University of the Third Age]. Through promoting knowledge, acquiring new skills and integrating older people with their environment UTW decreased the feeling of solitude of older people who became the students of UTW, improved their mood and self-acceptance as well as strengthened interpersonal contacts thus improving the quality of life of Ustka seniors and helped break the stereotype of older person as being inactive and sickly. A genuine community and intergenerational integration took place.

## Results

During the project, trainings, workshops, consulting and integration meetings were organised. Partnership relations were established with seniors' organisations from Kappeln, Germany — a sister city of Ustka.

Projects products were: website, promotional materials and elements of visual adds, renovation and supply of new equipment for the organisations main office. The organisation participated in city festivals and organised a charity lottery.

Finally, as a project result one must consider the fact that 15 people acquired the skills for managing difficulties, turning conflict into positive action and tolerance towards others which resulted in a bigger integration of the members of the organisation and its strengthening.

The added value of the project was the acquisition of active members of the organisation and users of its offer knowledge of the law behind non-governmental organisations, cooperation with the local community, of skills of writing projects and working on projects and acquiring funding.

## What is worth promoting?

Thanks to financial aid from the so-called Norway Grants the **development of institutional capabilities of the association**, strengthening the **efficiency** and **quality** services being provided were made possible. Moreover, the project helped raise the level of qualifications and skills of the members of the association, supply the organisation with the necessary new equipment and support further improvement of its image by promotional actions.

UTW became the centre of continued integration of the local community of seniors. This was possible thanks to the activity of the members of the association, which established the Ustka

UTW. The association's activities include such areas as education, culture, recreation, tourism, entertainment, counseling for older people, publishing, research, therapeutics, and creation of self-help groups. UTW remains in cooperation with Polish and foreign universities of the third age, universities, education centres, academic and research centres, government institutions, local-government entities and institutions, non-governmental organisations, mass media and the industry. Various projects, participation in the life of the city and at the same time encouraging local official to participate in UTW's activities (through their participation in the Programme Council) support the integration of local communities minimising the risk of pushing seniors outside of social life.

### Description of case 2

Project name	FOSa ludzi, idei, działań (Federation of Social Organisations of people, ideas, activity)
Institution realising the project	Social Organisations Federation of Warmińsko-mazurskie Voivodeship
Source of project funding	Norway Grants
Project value	PLN 21,846.69
Project term	February — November 2009
Area of project realisation	Warmińsko-mazurskie Voivodeship

### Project description

The „FOSa ludzi, idei, działań” Project was financed through the Small Cross-Border and Inter-Regional Grant Fund from the funds of the EEA Financial Mechanism and the Norway Financial Mechanism.

The main goal of the project was to **strengthen and develop social initiatives** by social NGOs from the Warmińsko-mazurskie Voivodeship against social exclusion, mainly based on German partner's experience. Beneficiaries of the project were the representatives of social NGOs from the Warmińsko-mazurskie Voivodeship (member and partner organisations of the FOSa Federation, local communities of the voivodeship, etc.).

### Results

During the project, the organisers held meetings, study visits, training sessions, workshops, and expert evaluations were produced.

The project mainly focused on the integration of the local community, promotion of the notion of seniors' network and the dissemination and exchange of information.

### What is worth promoting?

**Exchange of good practices** with the German partner was exceptionally valuable. Thanks to the project, NGOs, working with broadly understood social issues such as the problems of seniors and women after mastectomy, from the Warmińsko-mazurskie Voivodeship have been integrated.

Project resources served as the basis for **developing the strategy** of the FOSa Foundation.

To sum up, analysis of the priorities of the Norway Grants alone indicates the minor value of the issues related to economic activation of people 50+/45+. Very rarely projects include activities which would hold people 50+ as the exclusive beneficiaries or as the predominant beneficiary group. Such projects were addressed to local communities in Pomerania and Warmia and Masuria, their territorial scope was small, and the construction of their predefined and realised activities was homogeneous and rather simple. It mostly included educational and informational activities.

It must stressed, that concentration of activity on horizontal issues helped also finance by this source projects the beneficiaries of which were older people. This does not offer basis for chang-



ing the evaluation of **low utilisation of this type of funding of activities addressed to older people. Moreover, project themes usually caters to the needs of the retired or people at the pre-retirement age, supporting social and general activation, while supporting only indirectly economic activation.**

## 7.4. Conclusions and recommendations

The aim of this chapter was to present the results of the research and analysis of the initiatives which may support professional and general (social) activation of people 45+, included in international programmes, such as: Framework Programmes, Norway Grants and Lifelong Learning Programme, with special consideration for Grundtvig. The themes and scope of analysed projects were extensive. Activities analysed included Framework Programmes of research character, „Norway” projects of local initiative character, as well as educational projects aimed at lifelong learning.

The analyses lead to the following conclusions and recommendations:

1. Projects realised within Framework Programmes in which Polish institutions participated would rarely engage the issue of the functioning of people 50+ within the modern labour market and the society. An important advantage of the initiatives is that they are continued in the long term, e.g. during next Framework Programmes for financing research on active ageing. This guarantees further development of the concept of active ageing in Poland, generating knowledge base of the processes supporting the transformations in the labour market which are a result of ageing of employment resources.
2. Among all the activities realised internationally, the strongest activation of older people is produced through projects realised as part of LLP. The initiatives mostly fill the main competence gaps of the people in this group, focussing on teaching them how to use ICT equipment and foreign languages. An important area of activity of Polish beneficiaries of LLP is connected with universities of the third age. Participation offers a chance to improve participants' competences but also to raise the general level of their life.
3. Inter-cultural and inter-generational transfer of knowledge is an important aspect of the activity within LLP. This results in increased openness of project participants, especially to break the stereotype of older people, both older workers and professionally inactive seniors.
4. The analysis of the projects financed through international sources indicates that the theme of economic activation of people 50+/45+ is not among the priorities of such initiatives.

**We recommend** intensification of activities for promotion of projects helping to activate professionally people 50+/45+ (especially those still employed) among potential beneficiaries.

5. An advantage of projects which include an international component is that they offer people 50+/45+ direct contact with foreign languages, culture of other nations, thus, establishing attitude of openness to change. Research shows that an increase of basic competences results in the increase of self-esteem of people at an immobile age, in the increase of their motivation, and it helps them fight their complexes. A rise in self-esteem and acceptance own place in a group or local community are also important benefits of participation in the analysed projects. The ability to cope with challenges and stress related to ever-changing world will surely help people 50+ function in their community, company, or family. It need be noted that it is extremely difficult to gather information about projects which tend to be scattered around the country and which are not always widely available.

**We postulate** that there be an information exchange platform, a solution and project “products” bank which could be used longer than only during and shortly after the realisation of the project and by a larger group of recipients. Project knowledge management formula also applies to Norway Grants and Framework Programmes. Institutions which realise the latter have noticed the need to establish a platform for propagating news, knowledge and information and built a multifunctional website (Triple e-dose, [www.kpk.gov.pl/triple](http://www.kpk.gov.pl/triple)). With its wide

range of themes, it is still a valuable source of information. It seems obvious that **we must recommend** the promotion of this website and the raise of knowledge of activation of men and women 50+. The information exchange platform designed for older people should possess a steady long-term source of financing. This also applies to the general issue of the exchange of knowledge and information as well as research and project results.

6. The effectiveness of a given programme or project, both national and international, should not be determined on the basis of the number of direct beneficiaries but the quality of the results which will produce an increase of economic activation of project participants, including people 50+/45+.

**We postulate** a more efficient monitoring system of project activities, considering both quantitative and qualitative indicators. The effectiveness of the activities should also be analysed using the delayed method, considering the planning of human resources and the sources of financing of the process.

# Chapter 8

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## Programmes targeted at people aged 50+/45+, implemented in Poland in the years 2004–2009 — synthesis

### Introduction

- 8.1. Evaluation of the realisation of programmes addressed to people aged 50+/45+, completed in Poland in the years 2004–2009
- 8.2. Good practices in the realisation of projects targeted at equal opportunities in the labour market of people aged 50+/45+



## Introduction

The analysis presented in the second part of this publication provides evidence suggesting that initiatives for the economic activation of people 50+/45+ have become in recent years priority areas of labour market policy and Polish social policy. This is a relatively new trend. The first systemic attempts at approaching this issue were made in 2005 but only with the introduction of „Solidarity across generations. Measures aiming at increasing the economic activity of people over 50” programme passed by the Polish government on 17 October 2008 included a comprehensive attempt at improving economic activation of people 50+.

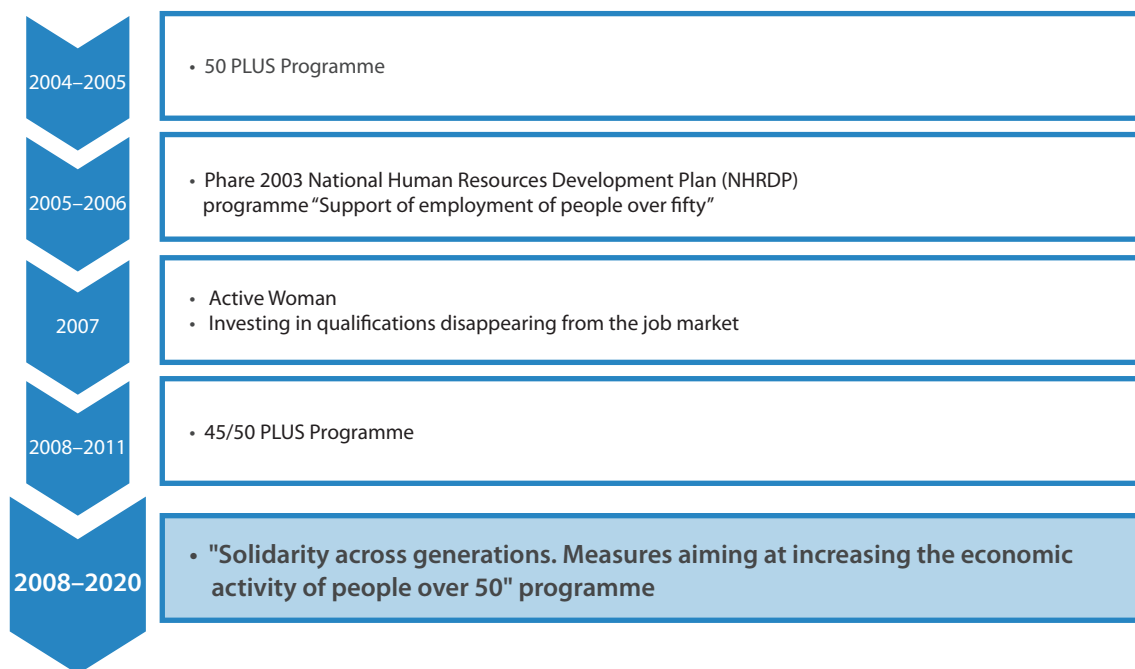
The first part of this chapter is a synthesis of all described programmes which take into consideration initiatives supporting equal opportunities for people 50+/45+ in the Polish labour market. It also considers spatial diversity of implemented initiatives, realised by Polish public institutions and private entities in the years 2004–2009.

Consecutive sections of this chapter present selected good practices related to the realisation of projects the core of which were the goals and actions addressed to people 50+/45+; their realisation could result in (however indirect or non-immediate) improvement of this group’s situation in the labour market. It has been attempted to emphasise most of all the effects and the elements distinguishing the presented projects from all other projects. This was done to draw the attention of future project initiators to those projects which might inspire their own ideas in relation to the offer addressed to people 50+/45+.

### 8.1. Evaluation of the realisation of programmes addressed to people aged 50+/45+, carried out in Poland in the years 2004–2009

#### **Significance of support programmes of economic activation of people 50+/45+**

Low economic activity of people at immobile age (this issue has already been raised earlier in this report) determines the need to start intensive actions supporting the increase of active participation of people 50+ in the labour market. In 2005, within the framework of the National Action Plan for Employment (NAPE), several employment promotion programmes, programmes limiting negative effects of unemployment and economic activation programmes were implemented, out of which worth noticing are: Programme 50 PLUS, „Aktywna kobieta” (Active Woman), „Inwestycje w kwalifikacje deficytowe na rynku pracy” (IKD) (Investing in deficit qualifications the labour market), Programme 45/50 plus. Initiatives undertaken during these programmes included various forms of support defined in the Act on employment promotion. Actions developed under NAPE merged with the PARP programme started at the end of 2005: Phare 2003 National Human Resources Development Plan (NHRDP) programme “Support of employment of people over fifty” during which people 50+ could receive financial aid for establishing own business, as well as training and counseling. Experience after the realisation of these projects served as basis for the central and local government initiatives package contained in the “institutions of social assistance and social integration” programme. Diagram II.4. presents a chronological list of programmes addressed to people 50+/45+ realised within the framework of NAPE.



**Diagram II.4.** Programmes included in NAPE for years 2004–2009 which included systemic initiatives addressed to people 50+/45+

Source: Own work.

The initiatives of the above programmes were financed by the Labour Fund and the European Social Fund.

Potentially, initiatives addressed to people 50+/45+ may also be financed by the government programme Civic Initiatives Fund (CIF), which since 2005 has been the source of funding for smaller initiatives, mainly realised by NGOs. Research shows that **CIF projects, at least those addressed to people 50+/45+, do not usually emphasise economic activation** but rather social activation and social security of older usually professionally inactive people.

The European Social Fund is one of the most important sources of financial aid of initiatives addressed to people 50+/45+, including initiatives of private institutions (incl. NGOs). Analysis of programmes of co-financed by the EU realised in the years 2004–2009 shows that it took the **Human Capital Operational Programme** for the years 2007–2013 to consider people at an immobile age as one of the more important groups which should receive support (which does not apply to all Priorities). The experience from 2004–2006 financial perspective was used here, in particular of the EQUAL Community Initiative Programme. It must be noted that until the end of 2009 projects addressed to people 45+ were only realised within the framework of the regional component of HC OP and their scope was spatially diverse as well as in terms of support areas (in understanding of HC OP Priorities).

Analysis of all 2004–2006 programmes co-financed by the EU indicates that none of them considered people 50+/45+ as one of the main beneficiary groups. Most of them considered people 50+/45+ as one of the groups in an exceptionally difficult situation on the labour market, however, they never assigned any special status to this group. Only within EQUAL Community Initiative Programme one support plan (Topic F, Goal IV) presumed support for workers 45+ (50+) in relation to qualifications' and competences' adjustment to labour market requirements.

As for 2007–2013 programmes, initial pilot projects started in 2007 were realised within the framework of the regional component of HC OP, especially with regard to Priority VIII „Regional Human Resources for the Economy” and Priority VI „The Labour Market Open for All”. Apart from actions realised within national projects, initiatives addressed to people 50+/45+ are also included in international projects in which Polish institutions cooperate. Those were mainly: Framework Programmes, Lifelong Learning Programme and Norway Grants. According to re-

search, such projects were rare and were related mostly to older people, usually those already retired.

The research enabled to identify 358 projects realised in the years 2004–2009 which were addressed mostly to people 50+/45+. Such high number of realised projects makes it almost certain that the problem of economic activation of older people has been noticed by the society and political and economic decision-makers.

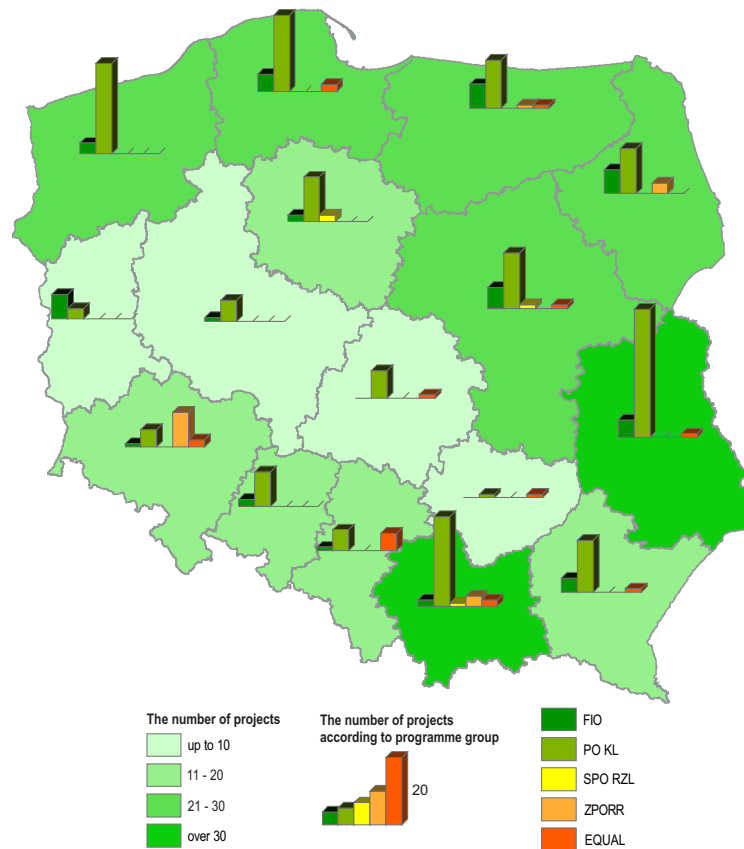
Summing up, national programmes had a more significant importance for the support of economic activation of people 50+/45+ than the abovementioned international programmes. Over 30,000 people were the beneficiaries of national programmes whose value exceeded 200 million PLN. The small number of international projects realised indicates that their potential has not been fully utilised. The realisation of international projects may only be evaluated as positive as an opportunity to learn and adapt in the future to the Polish conditions innovative solutions for equal opportunities of older people used by other countries. This has resulted in the exclusion from further discussion the next section related to projects realised within the framework of international programmes. Considering a different (pre-accession) character of support of Phare 2003, projects realised within the framework of the Phare 2003 National Human Resources Development Plan (NHRDP) programme “Support of employment of people over fifty”.

## 8.2. Spatial distribution of projects supporting equal opportunities of people 50+/45+ in the Polish labour market

Analysis of the spatial diversity of programmes the assumptions of which enable support of economic activity of people 50+/45+ was conducted on programmes co-financed by the EU in the framework of financial perspective for years 2004–2006 (SOP HRD, IROP) and 2007–2013 (HC OP), as well as CIF programme (financed through national funding).

Quantitative analysis of the realisation of the initiatives supporting equal opportunities for people 50+/45+ in the Polish market (in the years 2004–2009) indicated that in this period most projects of this type were realised in Lubelskie and Małopolskie Voivodeships, then Pomorskie and Zachodniopomorskie voivodeships (see Fig. II.18).

In the years 2004–2009, the broadest scope of financing of support initiatives for people 50+/45+ was offered by the Human Capital Operational Programme. This in turn, translated into its domination in many voivodeships over other support programmes for this age group in this time frame, considering the number of realised projects and the number of beneficiaries. Serious domination was recorded in those voivodeships where HC OP operating plans included clear definition of people 45+ as a separate beneficiary category from the very beginning. Voivodeships with a clear domination of projects financed through HC OP funding were: Kujawsko-pomorskie, Lubelskie, Łódzkie, Małopolskie, Opolskie, Podkarpackie, Pomorskie, Wielkopolskie and Zachodniopomorskie. In these voivodeships, HC OP projects constituted at least 75% of all projects through which people 50+/45+ had a change to improve their position in the labour market. Only Lubuskie and Dolnośląskie Voivodeships defied this regularity; more projects were financed there through other programmes — during the research period, in Lubuskie, labour market support for people 50+/45+ was offered by CIF projects while in Dolnośląskie — IROP projects.



**Figure II.18.** Spatial diversity of projects engaging people 50+/45+ in relation to their equal opportunities in the labour market realised in the years 2004–2009 according to programme type

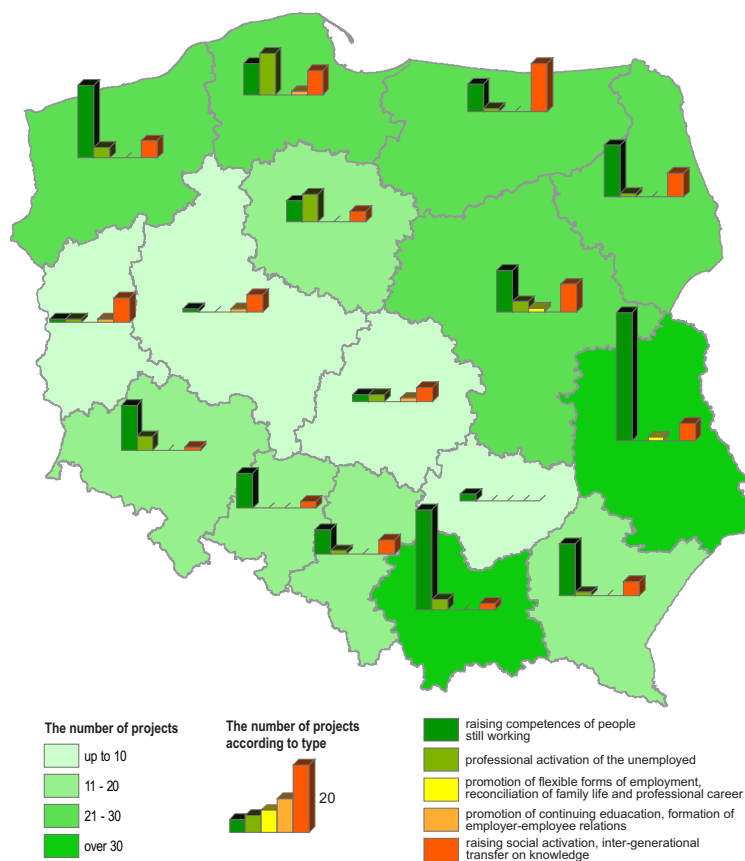
Source: Own work based on database of projects realised in the years 2004–2009

Most projects engaging people 50+/45+ for equal opportunities in the labour market included raising competences of people already employed (see Fig. II.19).

Projects addressed to workers aged 50+/45+ dominated in particular in the following voivodeships: Lubelskie, Małopolskie, Opolskie, Świętokrzyskie and Podkarpackie, and constituted at least 75% of the total number of projects. Projects related to this type of intervention were predominant in the following voivodeships: Podlaskie, Dolnośląskie, Mazowieckie, Śląskie and Zachodniopolskie. Intervention directed at increasing social activation and inter-generational transfer of knowledge influenced most projects in Warmińsko-mazurskie, Lubuskie, Łódzkie and Wielkopolskie Voivodeships. Support of activation of the unemployed constituted the main goal of projects realised in Pomorskie and Kujawsko-pomorskie Voivodeships (see Fig. II.19).

Support provided in the years 2004–2009 was mostly utilised by people 50+/45+ in Lubelskie Voivodeship and, even though to a lesser extent, beneficiaries from Małopolskie and Podkarpackie Voivodeships. For the projects assigned to the abovementioned voivodeships, the total number of project participants exceeded 3,000 (see Fig. II.20). At the other extreme, there were: Dolnośląskie, Świętokrzyskie, Lubuskie and Wielkopolskie voivodeships, where the number of beneficiaries representing the 50+/45+ age group who participated in projects supporting their equal opportunities in the labour market did not reach 1,000.

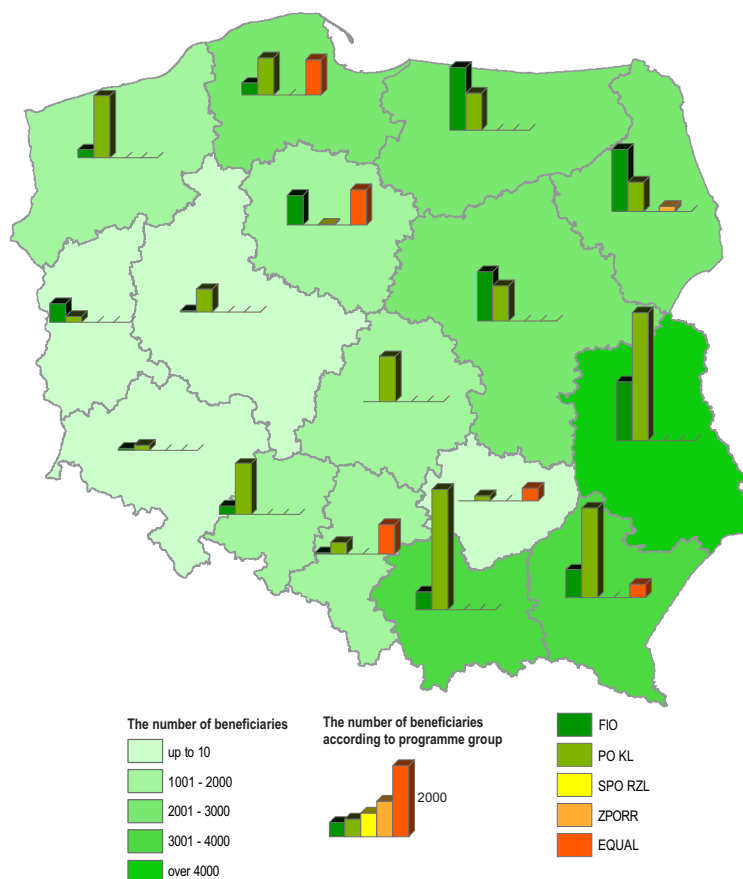




**Figure II.19.** Spatial diversity of projects engaging people 50+/45+ in relation to their equal opportunities in the labour market realised in the years 2004–2009 according to intervention type

Source: Own work based on database of projects realised in the years 2004–2009

Analysis of the „total number of beneficiaries aged 50+/45+” indicator shows that in terms of numbers HC OP played the biggest role from the point of view of equal opportunities of people in this age group in the labour market of Łódzkie, Małopolskie, Opolskie, Zachodniopomorskie and Wielkopolskie voivodeships. In the case of these voivodeships, participants of HC OP projects constituted at least 75% of the total number of beneficiaries in this age group. HC OP project beneficiaries were also the predominant group in: Dolnośląskie, Podkarpackie and Lubelskie voivodeships. The role of Civic Initiative Fund, considering the analysed indicator (total number of beneficiaries aged 50+/45+), was significant in Lubuskie, Podlaskie, Warmińsko-mazurskie and Mazowieckie Voivodeships. Finally, EQUAL CIP addressed its projects to the most numerous, in relation to other voivodeships, groups of recipients aged 50+/45+ in: Świętokrzyskie, Śląskie and Kujawsko-pomorskie voivodeships.



**Figure II.20.** Spatial diversity of projects engaging people 50+/45+ in relation to their equal opportunities in the labour market realised in the years 2004–2009 according to the total number of beneficiaries and programme type

Source: Own work based on database of projects realised in the years 2004–2009

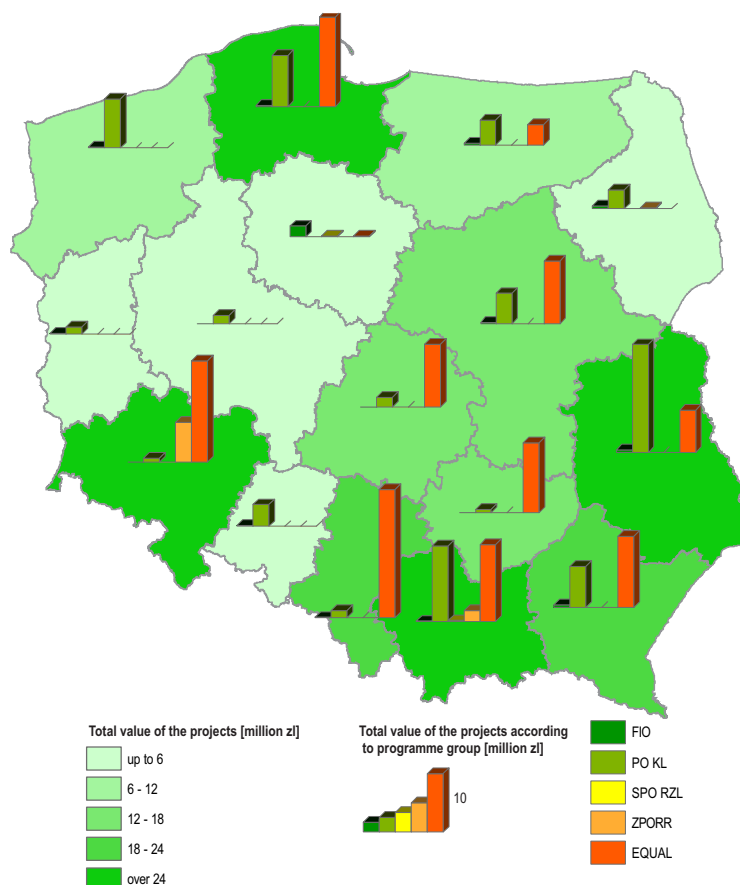
An important measure of the value of started initiatives is the value of provided support. As indicated in Fig. II.21., in the years 2004–2009, the largest total amount of funding was consumed by projects addressed to people 50+/45+ to improve their position in labour markets in: Lubelskie, Dolnośląskie and Pomorskie voivodeships (over 24 million PLN in each voivodeship) and the smallest in: Lubuskie, Wielkopolskie, Kujawsko-pomorskie, Opolskie and Podlaskie Voivodeships (less than 6 million PLN each).

Considering total value of realised projects, one must notice the initiatives conducted thanks to the following sources of funding:

EQUAL CIP in: Śląskie, Dolnośląskie, Pomorskie, Świętokrzyskie, Łódzkie, Podkarpackie, Mazowieckie and Małopolskie Voivodeships;

- HC OP in: Lubelskie, Zachodniopomorskie, Opolskie, Warmińsko-mazurskie, Podlaskie, Lubuskie and Wielkopolskie Voivodeships;
- CIF in Kujawsko-pomorskie Voivodeship.

It has been noticed that in the case of some voivodeships support for people 50+/45+ concentrated mostly around a single programme. Such a situation occurred in: Śląskie, Świętokrzyskie and Opolskie Voivodeships, where support for the discussed age group for their better preparation for the competition in the labour market mostly came from the EQUAL programme. In Zachodniopomorskie Voivodeship, on the other hand, most financial aid for realised projects came from HC OP.



**Figure II.21.** Spatial diversity of projects engaging people 50+/45+ in relation to their equal opportunities in the labour market realised in the years 2004–2009 according to the total number of projects and programme type

Source: Own work based on database of projects realised in the years 2004–2009

## Results of initiatives

Project analysis based on the declared evaluation of the results offered by project managers stipulates that most projects have reached their goals. Main criteria included: number of beneficiaries, number of realised training hours, number of people who raised their professional competences and received appropriate certificates.

Support for people 50+/45+ was mostly realised using conventional methods, training sessions being the most dominant form. Other methods of raising competences, such as mentorship and coaching, were far less popular.

Support area usually included raising language skills, improving computer literacy, learning basics of management, professional training, training preparing for starting own business and operating in the modern labour market. Relatively few projects developed other skills which, as it was indicated in previous chapters, would be useful for older people in the labour market, such as the ability to cope in stressful situations, coping with failure, and openness to change. Even though the actions undertaken for support of equal opportunities of older people in the labour market often were not individualised enough, they have surely helped bridge competence gaps. By monitoring the situation of people 50+/45+ in the labour market after the end of the project we would gain a more precise answer to the question of real effects of the initiatives addressed to this group of people; however, this rarely was an area of information pursued by project managers. Nonetheless, information provided by the managers of some (however few) projects who

tracked the paths of their beneficiaries indicate that those projects have in fact brought about a positive change in the labour market, at least in the case of the beneficiaries.

### Advantages and disadvantages of realised programmes

Advantages of the realised programmes include:

- realisation of a significant number of projects in a relatively short time which produced a strong promotional effect drawing attention to the needs and support opportunities for older people,
- fulfillment of results assumed within programme frameworks,
- engagement of different groups of interest, including third sector entities, into economic activation of older people,
- a chance of drawing upon international experience when realising national programmes supporting economic activation of older people.

Disadvantages of the realised programmes include:

- many programmes did not distinguish people 50+/45+ as a special category of beneficiaries to receive support<sup>55</sup>,
- lack of specified goals related to raising economic activation of older people in programme assumptions,
- lack of coordination and integration of actions undertaken for economic activation of older people at the national or regional level and the resulting dispersed mode of support,
- domination of average and mediocre training courses,
- low dissemination of project results,
- lack of monitoring of the situation of the beneficiaries aged 50+/45+ in the labour market after the end of the programme. Such monitoring would provide reliable, global evaluation of programme effectiveness in respect to equal opportunities of people 50+/45+ in the labour market.

### Directions of change

Analysis of the documentation related to programmes and initiatives realised in the years 2004–2009 designed to support people 50+/45+ in the labour market indicates that economic and social policy decision-makers display a growing awareness of the need to support older people, and what is more, this translates into an increase of financial means assigned to financing relevant initiatives.

Programmes realised in the initial phase, i.e. in the years 2004–2006, were usually nation-wide initiatives, with a lower participation of voivodeships in supporting economic activation of older people. It is the new programming phase (years 2007–2013) and increased capabilities of financing the transformation of the socio-economic structure of the country as well as individual regions that brought about a significant breakthrough in promotion and support for economic activation of this age group. People 50+/45+ have become the preferred group in many programmes (HC OP in particular) among other people in a difficult situation in the labour market. The needs of this group receive considerable financial aid, counted in several hundred million PLN. Unfortunately, in view of the delay in allocation of financial means, the effects of the initiatives undertaken did not become visible in the analysed period (2004–2009) in every voivodeship, which may disturb the shape of spatial diversity of intervention undertaken for people in this age group and its effects.

One might also observe a distinct broadening of the spectrum of initiatives addressed to people 50+/45+ for equal opportunities in the labour market. While in the years 2004–2006, train-

<sup>55</sup> A good example of this was the realisation of the IROP programme which, coupled with a rather liberal manner of defining support areas, was used as a source of financing for initiatives focused on equal opportunities of people 50+/45+ in only a few voivodeships.

ing initiatives and initiatives related to professional counseling and employment exchange dominated, since 2007 the scope of initiatives has started to also include „**hard**” projects”, i.e. those related to financing businesses started by people in this age group and “soft” projects, such as **informational campaigns** which promote longer employment of older people.

Starting from 2008, initiatives have become more planned and coordinated. There are attempts at diagnosing the situation of people 50+/45+ in the labour market, analysing the effectiveness of realised initiatives and improving the coordination and cooperation between labour market institutions in relation to economic activation of this age group.

### 8.3. Good practices in the realisation of projects targeted at equalising opportunities in the labour market of people aged 50+/45+

Description of projects selected as good practices was developed based on projects summaries which include information provided by institutions responsible for their implementation and acquired through interviews with project managers.

Projects presented here were selected based on the criteria defined in „Initial remarks” to the second part of this publication. We wish to remind you that four areas have been identified where instances of good practices have been searched for, i.e.:

- 1) raising competences of employees aged 50+/45+,
- 2) economic activation of the unemployed aged 50+/45+,
- 3) promoting flexible forms of employment, reconciling family life and professional career,
- 4) promoting the notion of continued education, shaping better employee — employer relations.

#### Areas 1. Raising competences of employees aged 50+/45+

Competences are understood as a notion broader than qualifications, encompassing „knowledge, skills, personal traits and attitudes all necessary for the realisation of professional tasks at the successful and (or) exceptional level, according to the standards specific of a given position” (Król, Ludwicyński 2006, p. 685). All employee characteristics which enable them to reach set goals are a particularly important tool for adjusting employee’s knowledge, skills and abilities to the ever-changing labour market requirements, thus, raising their value in the labour market. The constantly changing employment environment of today makes employee’s adaptation abilities especially important. Therefore, it is vital to refine them in branches of industry and regions subject to economic restructuring. They are of prime significance for people underprivileged in the labour market, including older people.

Projects focused on raising competences of employees constituted 60% of the total number of projects identified to support equal opportunities of people 50+/45+ in the labour market. The most popular source of financing projects which belong to this area was Sub-measure 8.1.1. „Support to developing professional qualifications and counseling for enterprises” of HC OP. A few individual projects were financed through other programmes, mostly through EQUAL CIP and IROP 2.1. „Development of competences linked to the regional labour market needs and Lifelong Learning opportunities”.

## Good practice 1

Project name	Experienced and active Security Officer 45+
Institution realising the project	Gustaw Securitas System sp. z o.o.
Source of project funding	HC OP Priority VIII Sub-measure 8.1.1. Support to developing professional qualifications and counseling for enterprises
Project value	PLN 392,567.87
Project term	01.04.2008 — 31.03.2009
Area of project realisation	Zachodniopomorskie Voivodeship

## Project description

Project was addressed to a group of 60 people 45+ from the Zachodniopomorskie Voivodeship, who completed secondary education at the most and who were interested in gaining knowledge and experience necessary for working as first-grade physical security officers and mass event security officers. Participants mostly included former shipyard workers who lost their jobs with the shipyard's bankruptcy and people working at shopping centres as security officers without security officer licences.

The main goal of the project was to stimulate people already employed to raise and update their professional skills in order to stay active in the labour market by means of: (i) increasing their employment capability through training enabling them to gain first-grade physical security officer or mass event security officer qualifications, (ii) eliminating financial barriers related to the costs of such training, (iii) overcoming a passive attitude towards their own professional career and fear of change related to the process of company adaptation and modernisation. During project realisation, its beneficiaries participated in training courses related to acquisition of new skills necessary in a company which provides personal and property security services. This way participants had access to any equipment and items used by security officers in their work. Parts of the course were conducted outside the company's seat, which allowed the participants to use their knowledge in practice.

## Results

As a result, 60 people aged 45+ (including 3 women) from the Zachodniopomorskie Voivodeship have improved their situation in the labour market by acquiring first-grade physical security officer and mass event security officer qualifications, which was confirmed by appropriate individual certificates. Other measurable project results include: (i) 50% of the participants received payment raises as a result of raising own competences, (ii) some changed their employer, (iii) some participants were employed by the company which organised the training; this included further raising of qualifications and preparation for acquiring second-grade physical security office licence.

Additionally, the participants improved their skills of active participation in the labour market, they raised their professional motivation, increased self-esteem and overcame the fear and uncertainty related to the possibility of change of employment.

Assumed „hard” indicators of project realisation (such as: course completion by 60 people, 307 hours of training sessions, 180 certificates confirming completion of course) were fulfilled in 100%.

## What is worth promoting?

This project is a good example of **planned approach** towards recognising the need of people 45+ because before applying for financial aid for the realisation of the project, the Applicant conducted research on a group of 236 people to diagnose potential interest in gaining knowledge and skills necessary for working as first-grade physical security officer or mass event security of-

ficer. Result analysis enabled the recruitment of course participants. Another important finding of the research was that course participants would not otherwise be able to pay for the course. This means that without outside support they would not be able to raise their professional competences, and thus, improve their chances for retaining their economic activation.

### Good practice 2

Project name	Women 45+
Institution realising the project	"SYSTEM" Extramural Vocational Centre
Source of project funding	HC OP Priority VIII Sub-measure 8.1.1. Support to developing professional qualifications and counseling for enterprises
Project value	PLN 586,644.00
Project term	01.10.2008 — 30.11.2009
Area of project realisation	Świętokrzyskie Voivodeship

### Project description

Project was addressed to 150 employed women 45+ from the Świętokrzyskie Voivodeship and its goal was to improve their employment capability and neutralise social exclusion which women face because of their age. This goal was pursued by means of creating an individual plan for raising competences of the beneficiaries, increasing their motivation for learning and supporting the rise of trust in their own abilities and skills. Within the project framework, a Women's Support Centre was created which served the improvement of women's situation in the labour market through, e.g. aid in changing jobs, opening own businesses, legal counseling in relation to employment regulations, etc.

### Results

As a result, 150 participants of the project aged 45+ from the Świętokrzyskie Voivodeship improved their professional potential and faith in their own strength and they gained additional skills or supplemented those that they have already had.

During classes conducted by a coach an analysis of the situation of each participant was conducted, the meetings also helped them improve their skills of autopresentation, communication, assertiveness, and of implementation of changes in professional life. Classes with a professional counsellor provided for them a psychological diagnostic session, during which a video was recorded of individual professional presentation of each of the women and a plan for further development was created, which enabled them to choose professional training. They could also receive counseling from a professional counsellor at the office or via internet chat. In total, 1120 hours of professional training were realised on the following topics: EU funds specialist (4 editions, 60 trained participants), spa therapy (3 editions, 47 trained participants), internal audit (1 edition, 15 trained participants), basic accounting (1 edition, 15 trained participants), advanced accounting (1 edition, 12 trained participants), and 190 hours of individual counseling at the Women's Support Centre. Professional training consisting of 112 hours was selected for each participant according their individual plan of professional development.

All project participants received certificates confirming their competences and the initial „hard” indicators of project realisation (such as: 150 women to finish professional training, 112 hours of professional training, 150 professional psychological diagnoses of competences to be developed) were fulfilled in 100%.

### What is worth promoting?

This project is an excellent example of **activity preparing a group of people, especially those threatened by negative consequences of economic restructuring in the region** (in this case, in the Świętokrzyskie Voivodeship) to function in a new for them labour market reality.

The selection of recipient groups is worth noticing, i.e. the initiative was addressed solely to women aged 45+, still working but whose job position was endangered. Activities included in the project were comprehensive and were particularly important for employees willing to broaden their professional qualifications adjusting them to the requirements of the modern labour market. What is worth noticing, is the well-weighted scope of support, starting from collecting information about participants which helped develop individual plans for professional development for each of them and the selection of the right path of further education and broadening of knowledge.

Projects of this type stimulate further raising of professional competences and indicate the benefits of improving own chances in the labour market. They are addressed to people still working which prevents them from becoming unemployed or considerably shorten the length of their unemployment.

### Good practice 3

Project name	First Step — economic activation of the inhabitants of the Nowa Wieś Wielka commune
Institution realising the project	Nowa Wieś Wielka commune
Source of project funding	HC OP Priority VI Measure 6.3. Local initiatives for the increase of the level of economic activity within rural areas
Project value	PLN 20,132.44
Project term	01.04.2009 — 30.06.2009
Area of project realisation	Kujawsko-pomorskie Voivodeship, Nowa Wieś Wielka commune

### Project description

This project was addressed to 20 people aged 50+ from the Kujawsko-pomorskie Voivodeship who lived in rural areas. Target group consisted of mostly farmers, self-employed people and people economically inactive.

The main goal of the project was to stimulate economic activation in rural areas for seeking employment in non-agricultural businesses, using natural and tourist assets of the commune. This goal was reached through: (i) activation of the local community to start own businesses — “Ideas for my business” workshops, activation meetings encouraging them to seek alternative sources of income, such as agrotourism, (ii) presentation of means of utilisation of commune’s tourist potential — multimedia presentations and information shared through a website.

### Results

As a result, 20 participants aged 50+ from the Nowa Wieś Wielka commune (8 of whom were women) received thorough education on how to start their own businesses, which increased their chances of gaining income outside the agricultural sector. During the „Ideas for my business” workshops, participants were provided knowledge necessary for establishing their own agrotourism businesses which will utilise the natural and tourist assets of the commune; the participants have grown to realise the possibility to set up an additional business venture by starting a small business or by changing their own area of expertise.

All project participants received certificates confirming their new skills, and the „hard” project indicators (such as: 20 project participation certificates, 12 hours of meetings, 4 press releases, 5 evaluation surveys) were fulfilled in 100%.



### What is worth promoting?

This project is an excellent example of supporting economic activation of people 50+/45+ who still work, **living in rural areas**; it enabled its participants to **develop their business competences**.

The themes of the workshops are worth mentioning, as they helped fill the gap in the skills in the regional labour market. One can expect, that the model of activation of local communities developed during this project will result in increased motivation for entrepreneurship and for seeking alternative sources of income.

## Areas 2. Economic activation of the unemployed aged 50+/45+

Economic activation of the unemployed is one of the key issues of employment policy in Poland. People 50+/45+ are considered as one of the target groups of the intervention. Their labour market situation is exceptionally bad which is mostly a result of low professional and spatial mobility of older people.

Projects which address economic activation of the unemployed aged 50+/45+ constituted ca. 12% of the total number of projects related to equal opportunities of this group in the labour market. Half of them was financed through Sub-measure 6.1.1. “Support for the unemployed in the regional labour market” of HC OP. A significant number of projects in this area was financed by EQUAL CIP. Some projects were financed through Sub-measure 8.1.1. of HC OP, Sub-measure 7.2.1. of HC OP, Measure 7.3. of HC OP and Lifelong Learning Programme.

### Good practice 4

Project name	Welding according to EU norms — recipe for a new life
Institution realising the project	WZDZ Szczecin [Voivodeship Vocational Training Centre]
Source of project funding	HC OP Priority VI Sub-measure 6.1.1. Support for the unemployed in the regional labour market
Project value	PLN 598,663.00
Project term	01.07.2008 — 31.12.2009
Area of project realisation	Zachodniopomorskie Voivodeship

### Project description

This project was addressed to the unemployed up to 25 and 45+ from the Zachodniopomorskie Voivodeship. The main goal of this project was to motivate the unemployed participants to become active professionally and to raise their skills and competences in the labour market. Thanks to project actions, project beneficiaries used: (i) pre-training counseling which offered them diagnosis of the degree of their professional readiness, qualifications and professional skills they had, (ii) professional training in welding metals and pipes (145 hours) and English or German language courses at different levels, which introduced specialist welding terminology (40 hours), (iii) post-training counseling shaping active attitudes of project participants for seeking employment and employment agencies, and it helped them become registered in the database of people seeking employment. Project scope was defined based on the analysis of the region’s labour market; the final shape of the project corresponded to employment plans of the largest regional employers — Stocznia Szczecińska Nowa.

### Results

As a result of the project, 25 unemployed men aged 45+ (from among 40 participants of the project) from the Zachodniopomorskie Voivodeship raised their capabilities of fighting unemployment by gaining welding skills and required licences necessary for the job. Project participants

have received language training, with special consideration for specialist vocabulary. Additionally, they have identified their skills and professional abilities, they have become motivated to seek employment, they have raised their self-esteem, they have become more willing to seek employment in the free labour market and they understood the idea of investing in themselves in order to change their fate. A concrete result of the project was that 15% of project beneficiaries gained employment with the end of the project.

All participants of the workshops received certificates confirming their competences and the initial „hard” indicators of project realisation (such as: 40 people to finish professional training, 40 welding licences, 145 course hours, 40 people to finish language courses) were fulfilled in 100%.

### What is worth promoting?

This project is an excellent example of activation of the unemployed who tend to have most difficulty in seeking employment in the labour market because of their age. Thanks to their participation in the project, they have acquired specialist qualifications. What must be emphasised is the comprehensive character of the support for people in the labour market — training and professional counseling constituted only one part of the entire initiative; project manager ensured, what often seems to be neglected, that the recent trainees receive instructions on how to operate in the labour market.

### Good practice 5

Project name	Find your place in Gromadka commune
Institution realising the project	Bison Consulting SA
Source of project funding	HC OP Priority VII Measure 7.3. Local initiatives for active integration
Project value	PLN 38,463.73
Project term	15.12.2008 — 16.03.2009
Area of project realisation	Dolnośląskie Voivodeship, Gromadka commune

### Project description

This project was addressed to 12 inhabitants of Gromadka commune threatened by social exclusion, i.e. people 50+ who have remained unemployed for a long time.

The main goal of the project was to improve employment capabilities of the residents of Gromadka commune threatened by social exclusion because of their long-term unemployment by: (i) supporting actions focused on seeking forms and methods for the prevention of social exclusion, (ii) supporting the development of initiatives aimed at activation and integration of local communities, which in turn aid the realisation of the strategy of human capital development in rural areas, (iii) strengthening and developing social aid and integration institutions. During project realisation, project beneficiaries participated in workshops focused on active seeking of employment and professional counseling workshops, as well as individual meetings with a psychologist and professional advisor.

### Results

As a result, 12 women aged 50+ from Gromadka commune increased their chances in the labour market by acquiring the ability to actively seek employment and by participation in individual professional counseling sessions. During project actions, project beneficiaries analysed their current failures in seeking employment, they analysed their strengths and weaknesses, they have learnt about the techniques used during job interviews, and they developed job application documents: CVs and cover letters. During individual counseling sessions with a psychologist and

with professional advisor plans of future operating plans were developed, which will help them seek employment and professional development paths were developed for each participant.

All participants received certificates confirming their new skills and abilities. Assumed „hard” project indicators (such as: 4 workshop modules, 12 people, who will finish the course, 12 evaluation surveys, 36 sessions with psychologist, 12 individual professional plans will be developed, 12 sessions with professional advisor, 20 hours of professional counseling workshops) were fulfilled in 100%.

### What is worth promoting?

This project is a good example of **activation of the unemployed from rural areas who are threatened by social exclusion**. Themes offered during the workshops filled the gaps in the participants’ abilities to actively seek employment, thus, raising their chances of finding employment in the local labour market.

What is worth noticing is the selection of the target group — addressing initiatives to small communities serves not only increased economic activation of people who belong to this community, but also integrates residents of „small regions”. This works particularly well in small, rural communities as it spurs local bottom-up initiatives, which in turn aids the development of civic society.

### Good practice 6

Project name	Reach the Zenith of abilities in your 50ie's
Institution realising the project	“Zenit” Education and Culture Centre
Source of project funding	HC OP Priority VI Sub-measure 6.1.1. Support for the unemployed in the regional labour market
Project value	PLN 597,716.36
Project term	01.12.2008 — 31.12.2009
Area of project realisation	Kujawsko-pomorskie Voivodeship

### Project description

Project was addressed to 110 people aged 50+ from the Kujawsko-pomorskie Voivodeship who remain unemployed.

The main goal of the project was to raise the economic activation and employment capability of people 50+ who remain unemployed and to create conditions for the development of economic activation in the region. This goal was pursued through supporting initiatives focused on raising the level of economic activation and lowering pauperism and social exclusion. Those initiatives included: popularisation of professional counseling, professional courses leading to raising or change of qualifications adjusted to labour market requirements, psychological and counsellor support increasing motivation for further professional development.

As part of the project activities, project beneficiaries participated in workshops on active seeking of employment, group professional counseling sessions, and professional training, e.g.: customer services, forklift operator, accounting and HR services, OHS, computer literacy with special consideration for information and communication technology, biomassage, handling fiscal cash registers.

### Results

As a result of the project, 110 participants (including 91 women) from the Kujawsko-pomorskie Voivodeship increased their chances in the labour market thanks to finishing professional training and courses and workshops focused on active seeking of employment and professional counseling. Through realised training and professional courses project beneficiaries acquired new qualifications necessary in the modern labour market, which increased their

chances for finding employment and stimulated their motivation for further professional development. Professional counseling and active seeking of employment workshops enabled to identify the needs of project participants in regard to professional development based on Individual Operating Plans, the workshops helped develop their interpersonal, communication and analytic skills, exceptionally important when seeking employment, and they helped increase project participants' self-esteem.

All who participated in professional training and courses as well as in workshops received certificates confirming their new skills and abilities, and the assumed „hard” project indicators (such as: 110 people to finish courses, 11 courses to be conducted, 20 meetings to be held as part of promotional campaign, 110 people to participate in economic activation workshops) were fulfilled in 100%.

### What is worth promoting?

This project is an example of good practice in **activation of the unemployed threatened by social exclusion because of their age**. At the preparatory level, project team conducted survey research (300 surveys) in order to diagnose the environment of potential project beneficiaries. Support provided during the project was a response to the results of the research. What is worth emphasising is the character of initiatives which included professional counseling support and a wide range of courses offered which aided updating of professional skills and qualifications necessary in the labour market. An added value of the project was the creation of small groups, new multimedia techniques and use of the newest equipment during professional training. After the end of the project, the labour market situation of the project beneficiaries was monitored: 16 project participants were successful at finding employment, apprenticeship or internship.

The model of economic activation of the unemployed developed during the project, enabled them to increase their chances of entering labour market and remaining there.

## Areas 3. Promotion of flexible forms of employment. Reconciliation of family life and professional career

Traditional approach to social roles of men and women produces factors which *hinder* reconciliation of work and family life, e.g.: (i) minor participation of men in family responsibilities, (ii) low utilisation of flexible forms of employment and organisation of work time, (iii) childcare system not relevant to the needs of working parents. These factors may produce two types of women's behaviour: they may attempt to reconcile work and family life or they may become excluded for a long time from professional life and devote their time and efforts to family responsibilities. Prolonged exclusion results in their qualifications becoming out-of-date and problems for the employer related to finding substitutes for the post of the absent employee (Sadowska-Snarska 2008).

Men, on the other hand, as a result of the general model of the Polish family, are subject to excessive work load. Men, who become responsible for providing for their family, often work in excess of their capabilities. Employers are also aware of this; they often require men to be more efficient and available (Sochańska-Kawecka, Kołakowska-Seroczyńska, Morysińska 2009). Therefore, it seems justified to reconcile work and family life in case of both women and men.

One of the instruments for introducing equal opportunities for women in the labour market is the promotion and support of flexible forms of employment which would enable them to reconcile economic activity and family responsibilities.

From among all projects designed to introduce equal opportunities in the labour market for people 50+/45+ only four were related to the promotion of flexible forms of employment and reconciliation of work and family life.

## Good practice 7

Project name	Flexibility and innovation
Institution realising the project	The Association for the Development of Communes and Cities of the Garwoliński County
Source of project funding	HC OP Priority VIII Sub-measure 8.1.1. Support to developing professional qualifications and counseling for enterprises
Project value	PLN 111,960.00
Project term	01.03.2008 — 30.09.2008
Area of project realisation	Garwolin, Garwolin commune

## Project description

This project was addressed to people with at least secondary education aged 45+ who were employed in micro-company or small company on the basis of employment contract or other legal contract and who decided to raise or fill the gaps in their qualifications and skills or to gain new ones (through non-formal education).

The main goal of this project was to provide organisational and legal support in regard to utilisation of flexible forms of employment by current and potential employees aged 45+.

This goal was reached through: (i) promotion of flexible forms of employment — 16-hour workshops, (ii) promotion of new IT solutions — 50-hour workshops in utilisation of office applications and (iii) making project participants aware of the need for constant raising of qualifications of using information and computer technology in order to conform to the requirements of a computerised labour market.

## Results

As a result of the project, 50 people (including 30 women) with at least secondary education aged 45+ increased their knowledge in regard to flexible forms of employment and acquired new professional qualifications of using computer applications in their professional work. During 16-hour workshops on flexible forms of employment, project participants familiarised themselves with employment categories and the types of employment contracts, calculator of remuneration from different forms of employment was discussed and an analysis of employee remuneration in the context of employer costs was conducted. 50-hour workshops on utilisation of office applications helped the participants raise their knowledge of computer tools and improve their skills of using them in practice. Beneficiaries gained practical knowledge in: basic notions used in computer sciences, working with a text editor (Word), spreadsheets (Excel), creating and managing databases (Access), creating presentations (PowerPoint), managing computer networks.

Assumed „hard” project indicators (such as: 44 people to finish the course, 48 course hours in flexible forms of employment, 100 course hours in office applications) were fulfilled in 100%.

## What is worth promoting?

This project is an example of good practice in promotion of flexible forms of employment, and an example of economic activation of people 50+/45+ in the labour market.

What is worth emphasising is the comprehensive character of support which included: (i) promotion of flexible forms of employment which enable optimisation of the mode and time of work, minimise work costs and maximise employee's and employer's benefits, as well as (ii) increase professional competences in using computer applications in professional work.

One must also note the appropriate selection of the target group for which flexible forms of employment, such as part-time work, mandate contract, over-the-phone work, and information and computer technology skills may be their only chance to retain employment.

This project helped counteract the trend of laying off people 45+ who because of increased competition and high requirements in the computerised labour market were threatened by social exclusion.

## Areas 4. Promotion of continuing education. Formation of employer — employee relations

Low level of participation in continued education considerably restricts people from adapting to the ever-changing requirements of the labour market. This phenomenon mostly applies to older people, adding complications to their already difficult situation in the labour market. Therefore, it seems necessary to promote the notion of continued education which offers flexible adaptation of employment resources to economic requirements, and thus, stimulates activation of people 50+/45+, which should translate into their increased chances in the labour market (Znajmiecka-Sikora, Roszko 2010; Urbaniak 2008). As it was clearly stated in the Communication from the European Commission „*Member States can no longer afford to be without an efficient adult learning system, integrated into their lifelong learning strategy, providing participants with increased labour market access, better social integration and preparing them for active ageing for the future*” [European Commission, COM(2006)614].

Among the identified projects addressed to people 50+/45+, only five were related to this area. Sources of their financing were dispersed — they were financed through HC OP’s Priority IX and Priority VII and EQUAL CIP.

### Good practice 8

Project name	Knowledge — the key to new opportunities
Institution realising the project	Institute for European Initiatives
Source of project funding	HC OP Priority IX Measure 9.3 Promotion of formal lifelong learning in school forms
Project value	PLN 184,290.32
Project term	01.01.2009 — 31.08.2009
Area of project realisation	Pomorskie Voivodeship, communes: Gdańsk, Sopot, Puck, Wejherowo, Lębork, Kościerzyna, Hel

### Project description

This project was addressed to the inhabitants of several communes of the Pomorskie Voivodeship, aged 25–64, who indicated willingness to continuing education. The main goal of the project was to raise the level of awareness as to the benefits of raising and supplementing existing qualifications by: (i) stimulating interest and increasing motivation to participate in many forms of continuing education, (ii) raising awareness as to the benefits of raising and supplementing existing qualifications, (iii) indicating the benefits of participation in many forms of continuing education, (iv) promoting activeness which improves one’s chances in the labour market. During project realisation emphasis was placed on actions promoting the notion of continuing education (preparing posters, newspaper and radio announcements, redistribution of promotional material).

### Results

As a result, project participants (inhabitants of the selected communes of the Pomorskie Voivodeship) increased their chances in the labour market. This was possible thanks to the increase of their knowledge as well as their motivation to raise or supplement their qualifications. Finally, their attitude towards continuing education changed. On the basis of the results of an informa-

tion campaign, the following initiatives were implemented: Programme for raising qualifications of teachers and educators working with disabled children and teenagers in the Nowy Dwór and Puck communes, Nowy Dwór's forum for preventing social exclusion, etc.

### What is worth promoting?

This project is a good example of an initiative undertaken in the area of **raising awareness of the need for constant improvement of professional qualifications** by people aged 45+. Currently in Poland, forms of continuing education are rarely used, therefore, it seems vital to influence people's mentality in this respect. Such projects create the need for raising professional qualifications and indicate the benefits of improving people's chances in the labour market, which is particularly important for people 50+/45+ and their difficult situation in the labour market. This project was significant for its comprehensive approach to the issue of continuing education. It was decided that first it is necessary to diagnose the need of different recipients and to form their awareness of different paths of education. This is what distinguished the initiatives of the Institute from the initiatives of other beneficiaries who often offered extremely diverse types of training and courses but completely neglected the needs of their participants which in turn resulted in low turnout.

### Good practice 9

Project name	Fair Play employment. Promotion of entrepreneurship culture and labour market ethics
Institution realising the project	Institute for Private Enterprise and Democracy
Source of project funding	EQUAL Community Initiative Programme
Project value	PLN 4,239,184.00 (which included: PLN 2,952,808.00 — Measure 2.; PLN 1,286,376.80 — Measure 3.)
Project term	2005–2008
Area of project realisation	national-wide, training results tested in the Mazowieckie Voivodeship

### Project description

This project was addressed to employees aged 40+ who belong to groups most threatened by labour market discrimination. With them in mind, project developers created workshops enabled this group to develop their skills and abilities which increase their ability to adjust to structural changes and which raise their value in the competitive labour market. This project was realised in cooperation with Centrum Promocji Biznesu, Polish Chamber of Commerce and Polish-American Foundation for SME Counseling.

The main goal of the project was to increase currently undertaken initiatives aimed at raising business culture which includes employer-employee relations and promotion of positive models in this respect. This goal was pursued through promotion among employers employment culture and social responsibility of businesses in the labour market, and as for employees, it helped them gain skills enabling them to adjust to structural changes taking place in the labour market.

Project realisation included training sessions aimed at increasing: the ability to present and defend own position, the ability to organise team work, negotiation skills and the ability to use creative approaches to solving problems. Additionally, a course was organised focused on using new information and communication technologies and tools.

### Results

As a result, 140 participants (out of which nearly 50% were women), including 40 people aged 45+ gained skills facilitating adjustment to economic and labour market structural changes. Beneficiaries were helped develop attitudes enabling them to meet employer requirements and to retain employment. One of project results was the development of „Fair Play Employment”

standard which was tested in real life by 8 companies. Moreover, economic benefits gained by companies which use the principles of socially responsible business were estimated.

The results of using „Fair Play Employment” standard are evident for both, employers as well as employees. Companies which use honest and reliable rules of employment and which care about ethics in employer-employee relations produce better economic results than companies which do not use them. Ethical employer conduct strengthens employee loyalty, their engagement and may also help introduce improvements and savings in the company. These factors are usually visible in the long term, however, they also influence current situation, ensuring better working atmosphere, positive client evaluation and improve company image. The end effect are benefits which a product of elevated trust of other entities operating in the market towards to company which uses ethics when operating in the labour market. The improvement of employment culture is an important factor which motivates employees to work better, which in turn leads to better economic results.

### What is worth promoting?

This project is an example of **innovative approach to promoting entrepreneurship culture and employer-employee ethics**. Complying to these rules helps to introduce equal opportunities for older and young people in the labour market. What is worth emphasising is the “Fair Play Employment” standard developed as a result of the project in regard to the creation of proper employer-employee relations. This standard, if well-promoted and implemented by employers, will help multiply the effects in the labour market constantly undergoing structural change.

To sum up the discussion presented in this chapter, good practices presented here related to projects supporting equal opportunities for people 50+/45+ in the Polish labour market may serve a binder for all analysis results presented here of programme realised in Poland in the years 2004–2009. The next chapter, which is also the final chapter of this publication, is equally significant as it presents a synthesis of conclusions of the entire research and recommendations for labour market policy in Poland in relation to people aged 50+/45+.



# Chapter 9

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Conclusions and recommendations



The main goal of the *Equalising Opportunities on the Labour Market for People Aged 50+* is to promote economic activation of men and women aged 50+ and initiatives which support extension of their economic activation. Research efforts, presented comprehensively in this report, offers a review of the most important achievements accomplished in the years 2004–2009, which in turn serve as basis for formulating conclusions and recommendations. They are to serve further development of initiatives aimed at supporting people 50+<sup>56</sup> undertaken by labour market institutions (public employment services, in particular) and organisational units of social services agencies.

Analysis and evaluation of the situation of people aged 50+ in the Polish labour market in individual voivodeships, supported by the presentation of demographic conditions and legal restrictions related to developing equal opportunities of older employees in the labour market (who are still employed but also those who seek employment) constitutes the contents of the first part of the report entitled: “Men and women aged 50+/45+ and the Polish labour market. Legal basis for their support”. This part of the publication serves as a basis for the second part of this report which identifies, analyses and evaluated programmes addressed to people aged 50+/45+ which were realised in Poland in the years 2004–2009. Main emphasis was put on the scale of programme engagement of national and regional governments as well as on initiatives by entities which belong to the public or social sector, which were undertaken using national and foreign funding.

This report provides an extensive discussion of the vast range of issues related to equal opportunities of men and women in the Polish labour market. Many questions which the reader might have when reading it will require separate research which will employ quantitative and qualitative techniques, subjects of which will be various stakeholders of support for people aged 50+/45+, especially representatives of the institutions indicated here and social services agencies. As it was indicated before, such research is planned to be conducted as part of further work of the *Equalising Opportunities on the Labour Market for People Aged 50+* project.

Conclusions presented in this chapter are based on existing analyses which encompass themes related to the broad notion of economic activation of people 50+/45+ recorded in programme documentation of national and local governments and which are a result of actions initiated by public and social sector entities (see Diagram II.1). On their basis conclusions were formulated, the implementation of which should positively influence the development of support policy for economic activation of people 50+/45+ in the labour market. These recommendations were addressed to main stakeholders of support of people aged 50+/45+ in the labour market, i.e. labour market institutions and organisational units of social services.

Conclusions and recommendations will be recorded in the following form. The text below presents the synthesis of the main recommendations divided according themes. Their complete descriptions, together their addressees, are included in Table III.1. Tables include propositions of concrete activities to be applied, which can be undertaken by LMIs or ISASIs (institutions of social assistance and social integration), thus, improving the situation of people 50+/45+ in the labour market. Obviously these activities do not guarantee drastic improvement of the labour market situation of people who belong to the indicated age groups, however, they are an important holistic component of the approach to support of people at immobile age in the labour market.

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<sup>56</sup> As indicated in Initial remarks to Part II of this publication, research was focussed on initiatives aimed at extending economic activation addressed to people 45+ which complies with the direction of new policy which supports extension of economic activation of Poles.

### Summary recommendations for promoting equal opportunities of men and women aged 50+/45+ in the labour market

Ageing of Polish people influences the situation in the labour market and this trend will develop in the near future. The forecast general drop in the number of people at working age by 3.9 million (in years 2010–2035) will be a result of shrinking of mobile population (aged 18–44) and an increase by almost 628,000 of the population at working immobile age (aged 45–59/64) — see Table I.1. The labour market may soon have to face the problem of insufficient work force but most of all the need to adjust the qualification structure of ageing employment resources to the needs of the dynamically changing labour market of the highly competitive economy based on knowledge.

Today, almost one in three people who are still working belong to the immobile age group, which must be considered as a rather high level. In this respect, the situation worsens for older immobile groups. People aged 50+ (and women in particular) exhibit low economic activation. Moreover, during the period in question, one could observe a growing number of the unemployed in this age group among the entire group of the unemployed. It is particularly characteristic of eastern Poland. The profile of the unemployed aged 50+/45+ possesses two predominant features: the long-term character of their unemployment and usually a low level of education of the unemployed. This adds to the threat of social exclusion and the resulting economic and social consequences. Age 50+, coupled with other characteristic features identified in the Act on employment promotion (lack of professional qualifications, experience and at least secondary education), becomes a factor often associated with the extremely difficult situation in the labour market of people in this age group and their bigger difficulty in concurring unemployment. Thus, the importance of efficient monitoring of the labour market in this respect must be emphasised. Research shows that in the years 2004–2009, the scope of recorded and publicly available data on unemployment of people aged 50+ was rather extensive, and what is more, it was successively extended. A weak point of the monitoring data was its low temporal and spatial comparability. The Syriusz system, currently being implemented, should bring about an improvement in this respect. It will offer a chance to conduct more comprehensive evaluation of initiatives aimed to activate the unemployed (incl. people aged 50+/45+), which, in the long-term, will provide more accurate programme initiatives aimed at this age group.

Particularly important are the legal frames for initiatives undertaken by public and private institutions (including non-profit organisations) aimed at providing equal opportunities for people aged 50+/45+, as defined in the Act on employment promotion and labour market institutions of 2004, which introduced a category of people in special situation in the labour market, which includes people aged 50+. Consecutive amendments of the Act and other acts offered basis for systematic elimination of barriers for retaining employment by „older” people and for more extensive support of economic activation of the unemployed aged 50+. Most labour market policy instruments, which remain at the disposal of public employment institutions, are universal in character and they apply to people 50+ at the same rate to other groups which situation in the labour market is also considered as difficult. It need be stressed, however, than within the last few years, as a result of an intensification of initiatives aimed at economic activation of people 50+, this array has grown to include instruments aimed specifically at this age group (e.g. financial aid for training schemes for not only the unemployed, but also for people still working, and more preferable conditions of intervention works).

Analysis of statistical data and legislative changes indicates that initiatives aimed at raising economic activation of people aged 50+/45+ have only recently become priority areas of Polish labour market policy and social policy. During the pre-accession period in Poland, and similarly in other European countries, there was a very low interest in the problem of economic activation of people aged 50+/45+. The beginnings of programmed support for the opportunities of people at the immobile age in the labour market are associated with the Phare 2003 National Human Resources Development Plan Programme “Support of employment of people over fifty”. The first at-

tempts at systemic approach to this problem were included in the “50 PLUS. Employment support programme for people 50+”<sup>57</sup>. Attention was focused on the need to undertake initiatives supporting retaining and re-entering employment by people 50+. But it was the „Solidarity across generations. Measures aiming at increasing the economic activity of people over 50” programme to become the first and currently the only programme which systemically and comprehensively approached the problem of economic activation of people 50+. It included a set of initiatives promoting systemic solutions (legislative and non-legislative) addressed directly to people aged 50+/45+, both the unemployed and those who were still working as well as employers. This programme was also focused on people economically inactive which potentially could re-enter the labour market.

### Recommendation 1

It is necessary to continue programme initiatives undertaken at the national, regional and local level which are aimed at promotion of proactive attitudes and approach towards the labour market among ageing employee resources. The character of said initiatives should be adjusted to the ever-changing specificity of all future ageing groups of immobile population at the working age until 2035. One must assume that consecutive age groups of ageing employee resources will be better educated, and thus, will be more interested in continuing professional career rather than the generation of the post-WWII boom.

National plans for employment initiatives include extensive spectrum of support for economic activation of people aged 50+/45+. Among many forms of initiatives, apart from those addressed to general adult public (such as the development and popularisation of formal system of continuing education, popularisation of lifelong learning), one might also find forms which are directly aimed at people 50+ (e.g. development of employer incentives for employing people 50+, as well as incentives for employees in this age group to remain employed; public employment agencies could conduct active pre-employment policy in regard to this age group). It has been noticed however, that the provisions of RAPE on the types and assigned financial aid for improving the situation of economic activation of people 50+/45+ are not distinct enough. This weakens the possibility of articulating such initiatives at the regional or local level.

The problem of support of people aged 50+ in the regional labour market is reflected in regional plans for employment initiatives, but they do not always relate to the goals of labour market policy. RAPE rarely defines whether initiatives programmed to support economic activation of people 50+/45+ realise central government programmes or they are own initiatives of VEOs. RAPE often lacks reference to the „Solidarity across generations. Measures aiming at increasing the economic activity of people over 50” programme. It weakens the effect on assumed priorities and tasks, which in turn, may weaken the result of centrally accepted directions of labour and social policy in relation to people 50+/45+ in the regional or local labour market. It is often the case that programme documents lack a suggestion to use support instruments tailored specifically for the needs and abilities of people 50+/45+.

<sup>57</sup> The problem of ageing of society and its effects on, e.g. employment, was signalled in EU documents of 1993, in the provisions of the Green Paper — European Social Policy; this problem was also raised during later meetings of the European Commission (Głąbicka 2005, p. 115–127).

### **Recommendation 2**

It is necessary to ensure the existence of coordination and integration mechanisms of major directions of initiatives aimed at people 50+/45+ within the framework of active labour market policy at the national or local-government level. This generally includes directions which should define the structure of regional action plans for employment: diagnosis of the situation in the regional labour market situation, identification and extensive description of groups in difficult situation in the labour market, analysis of the conditions relevant to the realisation of labour market policy in a given region, e.g. SWOT. This would constitute a basis for determining priorities and goals and assigning specific realisation indicators.

In some voivodeships, activation initiatives were developed (read more in Chapter 3) which led to raising employment effectiveness of initiatives aimed at people 50+/45+. Good practices in this area should be popularised.

### **Recommendation 3**

It is necessary to organise periodic informational and promotional conferences and to create a theme website which would, e.g. present good examples of how to select the themes and methods of support of people 50+/45+ in the labour market, which would lead to raising employment. Both, conferences and the website would be a good forum for cooperation of stakeholders engaged in initiatives aimed at improving the situation of people 50+/45+ in the labour market.

HC OP is particularly important in the case of initiatives aimed at equal opportunities of people aged 50+/45+; within the years 2007–2013 it encompasses all interventions of the European Social Fund in Poland. The experience gained during the first period of financing will help utilise HC OP as an instrument for shaping regional and local labour market policy helping to increase equal opportunities for people 45+.

### **Recommendation 4**

In order for aid programmes to bring about positive results in the form of a certain number and quality of submitted projects for support of people 50+/45+ in the labour market, this category of people must be treated as a priority target group which requires clear statements to be included in those programmes that they support pro-employment direction of initiatives in relation towards this group. We suggest that the criteria for selecting projects should be more specific and that the pool of financial aid related to projects aimed at people 45+, which are clearly pro-employment in character, should be increased.

Separate support funds guarantee access of second and third sector entities (mostly public administration institutions and NGOs) to financial aid for initiatives aimed at equal opportunities of people aged 50+/45+ in the labour market. In the years 2004–2009, funding for specific theme projects aimed at various beneficiary categories mostly came from: Civic Initiatives

Funds, Phare, Sector Operational Programme Human Resources Development (SOP HRD), Integrated Regional Operational Programme (IROP), EQUAL Community Initiative Programme (EQUAL CIP), Human Capital Operational Programme (HC OP), Framework Programmes (FP V, VI and VII), Lifelong Learning Programme (LLP), Norway Financial Mechanism and European Economic Area Financial Mechanism (so-called Norway Grants). Evaluation of engagement of separate financial means for support of economic activation of people 50+/45+ varies between programmes. An example of low utilisation of support opportunities for the discussed age group in **regional labour markets** is CIF which usually considers people aged 50+ as those who will soon become economically inactive and for whom the best support is to prepare them for the new role of the retired. Thus, most projects from the years 2005–2007 were not aimed at stimulating economic activation of “older” people, but their social activation. Therefore, the chances of acquiring funding by appropriate organisations operating in support of equal opportunities of older people in the labour market remain high. In order to stimulate initiatives aimed in the required direction, we need mechanism which will not only encourage project-makers but which will also require them to consider more extensive goals and actions related to economic activation of older people (e.g. more funding for projects activating people 50+/45+, specific criteria of project selection).

### Recommendation 5

Experience in utilisation of CIF funding indicate that in order to improve the image of people aged 50+/45+ as a promising age group in regard to economic activation in the labour market, we cannot combine at the programming level goals and means for supporting economic activation of people 50+/45+ with goals and means for their social security.

Previous initiatives considered major gaps in competences of people 50+, i.e. computer and language training. However, support for people 50+/45+ is not always individualised and it rarely results in gaining employment. We suggest that a training to which a given person is assigned would be related to a specific job offer for the person and that such training was individualised which offers a higher chance of gaining employment at a given company. It is difficult since employers focus more attention on such employee characteristics as: attitudes and behaviour and motivation which cannot be formed through training which offers knowledge and develops skills (Juchnowicz 2010, p. 30–31).

### Recommendation 6

Support of people aged 50+/45+ in the labour market should also encompass people who are still working to help them fend off the threat of losing their job. Therefore, we recommend training „tailored” to the needs of individual people, which would be based on analysis of their needs, Individual Operating Plan and which would be supported by job coaching at the workplace.

Long-term unemployment of people 50+/45+ results in many unfavourable psychological symptoms (passiveness, resignation, apathy and frustration) and dangerous social phenomena (lower activity in fulfilling their family and social roles). These difficulties intensify in the case of people aged 50+/45+ of low professional and spatial mobility, after many years of stable professional career, often at one workplace.

### **Recommendation 7**

Our recommendation is to continue the comprehensive approach to economic activation of long-term unemployed aged 50+/45+, with special consideration for psychological support for people 50+/45+ as a desirable addition to other forms of economic activation, such as professional training. This should be coupled with further development of initiatives aimed at raising social awareness of the benefits of continuing employment adjusted to the abilities of people 50+/45+.

International cooperation within projects aimed at support for people aged 50+/45+ in the labour market aids the development of various innovative solutions which take into consideration inter-cultural and inter-generational factors for raising economic activation of older people.

EQUAL CIP received very favourable evaluations in regard to creating innovative elements for supporting equal opportunities of people 50+/45+ in the labour market. Thanks to innovative solutions developed in the Polish labour market, which were financed through EQUAL, new projects within HC OP could be based on its experience and they could formulate better-developed and fitted support offer for older people in the labour market.

Analysis of the direction of money flow from the support funds for economic activation of people at the working immobile age in the years 2004–2009 (particularly in the 2004–2006 financial perspective) proved that decision-makers and NGOs and training institutions applying for financial aid of their project have been maturing which indicates that aid should not only be aimed at the unemployed, but also at people who are still working to prevent them from losing their jobs.

All results presented above are itemised in Table III.1.



Table III.1. Conclusions and Recommendations on Programme Support of Economic activity of People Aged 50+/45+ in Poland

Summary Conclusions		Suggested Recommendations		
		Recommendation and Its Purpose	Justification	Recipient and Suggested Way of Acting Labour Market Institutions (IRP) <sup>a/</sup> Institutions of social assistance and social integration (ISAS) <sup>b/</sup>
<b>People Aged 50+/45+ in the Labour Market and Their Economic activation in National and Regional Labour Market Programmes</b>				
Increase of the number of people at immobile productive age and continuing quantitative decrease of population at mobile age till 2035.	<p>Intensification of activities promoting proactive attitudes towards professional work among people aged 50+ and creating a social climate positive for economic activity of these people.</p> <p>AIM</p> <p>Change in attitude towards work of people aged 50+/45+ and ways of handling unemployment; shaping will to keep people aged 50+ employed.</p>	<p>There are grounds to fear that a quantitative and structural shortage of jobs supply shall occur in the country.</p>	<ul style="list-style-type: none"> <li>One should continue activities popularising advantages of flexible employment forms and working time among people aged 50+ and employers.</li> <li>Social dialog institutions, and first of all, trade unions and non-governmental organisations should both at the national level (Inter alia Trilateral Commission on Social and Economic Issues, Chief Employment Council) and at the voivodeship and commune level (voivodeship and commune employment councils) animate activities promoting activity in the labour market by expressing their opinion on this matter during meetings devoted to discussions on the pension system shape in the country, taking into consideration people aged 50+/45+.</li> </ul>	<ul style="list-style-type: none"> <li>It is suggested to popularise employment opportunities increase on the open labour market thanks to social employment, targeted at people unemployed for a long period of time (inclusive of people aged 50+/45+) — social integration centres, social integration clubs, supported employment.</li> </ul>
<p>Too weakly stressed activities and financial resources devoted to economic activation of people aged 50+/45+ at the national, regional and local levels; it is proved by the fact that activities programmed in the National Plan for Employment concerning economic activation of people aged 50+/45+ have not been distinguished from the financial point of view and there is no detailed data on activation effects of the unemployed belonging to this group (they are hidden within the realisation of a general activities direction targeted at unemployed facing a special labour market situation).</p>	<p>One should try, if possible, to ensure at the stage of programming the area of activities professionally activating people aged 50+/45+.</p> <p>AIM</p> <p>Improvement of programming activities connected with economic activation of people aged 50+/45+ in the territorial context and effectiveness evaluation of taken up activities.</p>	<p>Lack of clear identification of activities and financial resources targeted directly at equalisation of opportunities of people aged 50+/45+ in the labour market causes that the taken up initiatives often “blur” within general activities targeted at people facing a special situation in the labour market; assumed effects are not distinguished which reduces the effectiveness of programmed activities targeted at economic activation of people aged 50+/45+.</p>	<p>Entities responsible for preparing the National Activities Plan for Employment project (a minister of labour with cooperation of, especially: ministers of economy, education, higher education, rural areas development and regional development) should — through laying out main directions of impingement at the national level (National Activities Plan for Employment) and providing more details according to the specification and needs of the given region at the regional level (Regional Activities Plan for Employment) — indicate this group of people as long as diagnoses reveal that unemployment of people aged 50+/45+ is a major social problem.</p>	

Suggested Recommendations		Recipient and Suggested Way of Acting	
		Labour Market Institutions (IRP) <sup>a/</sup>	Institutions of social assistance and social integration (ISAS) <sup>b/</sup>
Summary Conclusions	Recommendation and Its Purpose	Justification	
<p>Activities in the area of active labour market policy realised at the regional and local levels are not always based on broad and multifaceted diagnoses of the situation of unemployed 50+ people in the regional context which would reflect their specificity on the market — the Regional Activities Plan for Employment is limited to enumeration of an unemployed group facing a special situation in the labour market without analyses and facts; support offers targeted at this category are often of a universal character and are usually directed to all categories of unemployed people facing a special situation on the labour market; a similar conclusion concerning universality of support offers can be drawn for support projects within the Civil Initiatives Fund programme.</p>	<p>It is necessary to draw up guidelines according to which Regional Activities Plans for Employment should be prepared; they should be comparable from the point of view of contents.</p> <p><b>AIM</b></p> <p>Improvement of clarity, efficient coordination and monitoring of voivodeship employment offices activities for people aged 50+ /45+; improvement of the diagnostic part of Regional Activities Plan for Employment being a basis for identification of people facing a special situation in the labour market (inclusive of people aged 50+ /45+), in order to ensure greater accuracy and effectiveness of proposed activities targeted at improvement of the situation of this group of people; improvement of implemented activities coordination and monitoring their realisation in the whole country.</p>	<p>Ensuring that the contents of Regional Activities Plan for Employment are comparable shall enable making comparisons at the level of voivodeships; it shall enhance monitoring of the voivodeship employment offices activities for people aged 50+ /45+.</p> <p>At the present moment making interregional comparisons of planned activities for the activation of people aged 50+ /45+ is very difficult or impossible.</p>	<p>Guidelines concerning standardized entries according to which Regional Activities Plan for Employment shall include concrete activities directed to people aged 50+ /45+, should be prepared by the minister of labour; the proposal concerns a structure covering: diagnosis, analysis and aims as well as monitoring indicators connected with them. On such a basis aims and priorities would be laid out and concrete realisation indicators would be ascribed on the basis of which the effectiveness of carried out activities would be evaluated.</p>

Suggested Recommendations			
Summary Conclusions	Recommendation and Its Purpose	Justification	Recipient and Suggested Way of Acting
			Labour Market Institutions (IRP) <sup>a/</sup> Institutions of social assistance and social integration (ISAs) <sup>b/</sup>
The type of unemployment of people aged 50+ indicates that it is long lasting and thus a threat of social exclusion occurs.	Strengthening cooperation between District Employment offices and, especially, social welfare centres in relation to people aged 50+ threatened by long-term unemployment and social exclusion within selection of most effective forms of economic activation. AIM Broadening the cooperation range between District Employment offices and social welfare centres and their going beyond the obligation of informing each other on activities planned according to the agreement (Article 50, item 3 of the Act on Employment Promotion); the cooperation is targeted at gaining new positive employment effects in the case of long-lasting unemployment of people aged 50+.	Limitation of contacts between the District Employment offices and social welfare centres causes isolated localization of activities for support of people aged 50+ in the labour market in the area of active labour market programmes (District Employment offices) or social welfare; cooperation in both areas can bring better employment effects.	District Employment offices, having received an application from a social welfare centre concerning people aged 50+ taking advantage of social welfare benefits concerning their possible participation in forms of economic activation allowed by the law (article 50, item 2, section 2 of the Act on Employment Promotion) should, except for submitting to the social welfare centres information on inclusion in or exclusion of these people from the mentioned activities, further monitor the individual situation of separate unemployed and cooperate on adjusting the activation offer with social welfare centres; especially the point is if a possibility to direct to participation in a social contract, individual programme for becoming independent, local social welfare programme, individual social employment programme was taken advantage of in the case of graduating from the above-mentioned activities; District Employment offices with cooperation of Institutions of social assistance and social integration should monitor if a given person has returned to the open labour market — what are the premises for this and further recommended activities; if not — it is important to indicate barriers making activation difficult. To make a recommendation come into effect it is necessary to change the contents of the Act on Employment Promotion.
Long-term unemployment among people aged 50+/45+ is connected, first of all, with low professional mobility whose effect is a characteristic for the after-war boom generations long-term tenure of stable working conditions, often for only one employer.	It is advisable to apply obligatorily and simultaneously to training forms various forms of psychological support for people aged 50+/45+ in the form of, e.g.: workshops promoting attitudes conducive to economic activation, inclusive of readiness to change the working place, profession, specialty, employment form. AIM Re-establishing/strengthening self-esteem with people aged 50+/45+, especially those facing exceptionally difficult situation in the labour market.	Psychological support of people aged 50+/45+ especially threatened with an exceptionally difficult situation in the labour market enhances their opportunities for employment.	District Employment offices should assign bigger importance to organising psychological forms of support for people aged 50+/45+ and treat them as an indispensable component accompanying the organised professional trainings.  Taking advantage of psychological support in cooperation with people aged 50+/45+ threatened by social exclusion because of difficulties in the labour market — commune family support centres and social welfare centres should pay attention to inclusion of psychological support as an indispensable element of the programmes financed with UE support funds.

Suggested Recommendations		Recipient and Suggested Way of Acting	
		Labour Market Institutions (IRP) <sup>a/</sup>	Institutions of social assistance and social integration (ISAS) <sup>b/</sup>
Summary Conclusions	Recommendation and Its Purpose	Justification	
<b>Civil Initiatives Fund, Sectoral Operational Programme for Human Resources Development (SPO RZL), Integrated Regional Development Programme (ZPORR), the EQUAL Community Initiative Programme (CIP EQUAL), Phare, Human Capital Operational Programme, Framework Programmes (V, VI and VII), Lifelong Learning Programme, projects of Norwegian Financial Mechanism and EEA Financial Mechanism in 2004–2009</b>			
<b>Civil Initiatives Fund:</b> <ul style="list-style-type: none"> <li>Insufficient engagement of beneficiaries in economic activation of people aged 50+/45+;</li> <li>Visible orientation on people aged 50+; prevalence of projects oriented solely or mainly on people over 60;</li> <li>Lack of projects directly concerning people between 45 and 50 years old;</li> <li>Insufficient engagement of entities from voivodeships with high unemployment rate among people aged 50+.</li> </ul>	<p>A need for the entities to stimulate and to stronger engage in supporting economic activity of people aged 50+/45+ through resources available within the Operational Programme Civil Initiatives Fund.</p> <p><b>AIM</b> Popularisation among non-governmental organisations the usage of resources for stimulating economic activity of people aged 50+/45+ first of all in voivodeships with the highest unemployment rate.</p>	<p>The aim of this programme is stimulating the creation and supporting the civil initiatives development with the participation of the non-governmental organisations sector; many of these organisations could engage more in economic activation of people aged 50+/45+ supplementing the endeavour of the state targeted at economic activation of people aged 50+/45+.</p>	<p>Non-governmental organisations of the unemployed (article 6 of the Act on Employment Promotion) should to a greater extent than previously come up with project proposals whose aim would be gaining resources for activities supporting people aged 50+/45+ in staying on or returning to the labour market or finding a job; therefore it is recommended to popularise the existing possibilities of submitting projects in order to finance activities connected with economic activation of people aged 50+/45+, e.g. in the form of meetings or conferences organised by non-governmental organisations with people aged 50+/45+ who cooperated with drawing up and submitting the projects and then could work in an organisation and help other people aged 50+/45+; recommended support of the media</p>
<p>Decreasing tendency of financial resources share within the Civil Initiatives Fund devoted to realisation of integration and social activation purposes, connected, inter alia, with merging two separate areas, one of which concerned social protection of people aged 50+/45+ and the second one — their integration and economic activation.</p>	<p><b>Thematic separation of aims and realisation resources.</b> <b>AIM</b> Expanding the scale and enrichment of activity types oriented at economic activation support of older people.</p>	<p>Visible stressing of economic activation aims of people aged 50+/45+ and distinguishing indispensable resources shall encourage non-governmental organisations to apply for realisation of projects fulfilling exactly these aims.</p>	<p>A programme directed to social cooperatives oriented on promotion of the social cooperative movement idea, and especially to those interested in gaining resources for projects supporting older people who remain unemployed for a long time and threatened by social exclusion; popularisation and possibility to submit projects, e.g. through meetings with people aged 50+/45+ who established a social cooperative in order to support people threatened by social exclusion because of a long-term unemployment.</p>
			<p>Separation of aims at the level of programme designing of the Civil Initiatives Fund — a Minister for Labour.</p>

Suggested Recommendations			
Summary Conclusions	Recommendation and Its Purpose	Justification	Recipient and Suggested Way of Acting
			Labour Market Institutions (LMI) <sup>a/</sup> Institutions of social assistance and social integration (ISAS) <sup>b/</sup>
<p>Phare 2003: Projects targeted at entrepreneurship support were realised — both financial as well as training and consultancy ones; they confirmed the purposefulness of supporting people aged 50+ in the labour market; the first positive experience of the non-governmental organisations cooperation (they carried out numerous projects) with commune employment offices</p>	<p>Inclusion of a bigger group of people aged 50+/45+ as an entrepreneurship support beneficiary. AIM Increase of the new enterprises number; creating new working places.</p>	<p>Taking advantage of the experience and potential of people aged 50+/45+ in running business.</p>	<p>Distinguishing within Measure 6.2 of Human Capital Operational Programme people aged 50+/45+ as a target group of support (a strategic criterion rewarding activities targeted at this group of people.</p>
<p>Sectoral Operational Programme for Human Resources Development: Few examples of projects oriented on equalisation of opportunities of people aged 50+/45+ in the labour market indicate that the issue of supporting older people in the labour market and entities interested in it slowly developed to take up more complex activities.</p>	<p>Building awareness of the problem's significance, climate of social understanding and acceptance of economic activity of people aged 50+ is based on reference to origins, i.e. to the first projects in Poland oriented on supporting economic activity of people at immobile productive age. AIM Taking advantage of the first experiences in order to expand the range of possible activities for building social climate advantageous for equalisation of opportunities of people aged 50+/45+ in the labour market.</p>	<p>Analysis of mistakes in the first periods of projects allows drawing conclusions for more complicated projects started in the following periods.</p>	<p>As many labour market institutions as possible should be engaged in building social awareness of the importance of problems connected with economic activity support of people at the immobile age and a social climate favourable for professional work of 50+ people. In order to achieve that, it is proposed to organise micro congresses with people aged 50+/45+ who still work, e.g. through public employment institutions, labour agencies or non-governmental institutions together with, e.g. Information and Professional Career Planning Centre with cooperation of local media.</p>

Suggested Recommendations		Institutions of social assistance and social integration (ISAS) <sup>b/</sup>	
Summary Conclusions	Recommendation and Its Purpose	Justification	Recipient and Suggested Way of Acting
			Labour Market Institutions (IRP) <sup>a/</sup>
<p>Sectoral Operational Programme for Human Resources Development, Integrated Regional Development Operational Programme:</p> <p>These programmes have contributed much to the support of their participants aged 50+/45+ in the labour market because this group was not covered by preferences; as an effect only some projects within the Sectoral Operational Programme for Human Resources Development were oriented at equalisation of opportunities of people aged 50+/45+ mainly through trainings and development of “soft” competences. While within the Sectoral Operational Programme for Human Resources Development the beneficiaries were unemployed people, within the Integrated Regional Development Operational Programme employed people took advantage of the support for people aged 50+/45+; training projects addressed to them were mostly adapted to the specific needs of concrete groups of professions.</p>	<p>Basing on the Integrated Regional Development Operational Programme experience it is recommended to create projects oriented on professional needs of concrete recipient groups instead of projects of a universal character.</p> <p>AIM A better use of available means in order not to let people aged 50+/45+ be laid off.</p>	<p>People aged 50+/45+ taking advantage of the project support are not only unemployed people who are offered support in order to change the situation but also employed people threatened by a loss of job because of structural reasons — training in their case may prevent unemployment.</p>	<p>District Employment offices knowing the situation of the local labour market are able to acquire knowledge on employers groups threatened by layoffs because of structural and condition-dependent reasons; therefore, together with employers, they should prepare a training offer both for people covered by monitored layoffs and for those who have not yet been covered by them but are threatened by it; distinguishing these two groups would allow to prepare separate training offers whose aim would be, in the first case, to better equip the laid off employees aged 50+/45+, and in the second case — to prevent laying them off thanks to an increase of functional flexibility (this notion pertains to enriching the employees competence potential enabling them a change of positions and type of work). In the case of realising this recommendation it is advisable for the District Employment offices to cooperate with training organisations of the market and social sectors.</p> <p>District employment offices should start cooperation with social dialogue institutions in order to better adapt their professional training offer to the professional needs of employed people aged 50+/45+ through starting cooperation with trade organisations in companies in which people aged 50+/45+ are threatened by unemployment; such a cooperation would be based on the informative and consulting roles of trade unions.</p>

Suggested Recommendations			Institutions of social assistance and social integration (ISAs) <sup>b/</sup>
Summary Conclusions	Recommendation and Its Purpose	Justification	
<p><b>EQUAL Community Initiative Programme:</b> It made it possible to work out numerous innovative ways of supporting people aged 50+/45+ in the labour market in the Polish reality and to take advantage of international experience within supporting people from this age group in the labour market.</p> <p>The present engagement of the Human Capital Operational Programme projects whose target group were solely people aged 50+/45+ or of which these people took advantage as a group covered by a special support, should be considered as beneficial because the access to employment for people aged 50+/45+ threatened by social exclusion has increased although the Human Capital Operational Programme does not have any direct activities addressed to people aged 50+/45+.</p>	<p>A more extensive use of the programme's achievements in the presently designed activities for people aged 50+/45+, especially by organisations applying for resources for realisation of support projects for people aged 50+/45+ in the labour market financed, e.g. from the Human Capital Operational Programme.</p> <p>AIM More extensive implementation of innovative solutions and international experiences in order to better adapt the support offer for older people in the labour market.</p> <p>The financial perspective till 2013 should visibly stress both in the access criteria and project evaluation strategic criteria people aged 50+/45+ as a target group.</p> <p>AIM Taking advantage of positive experience within the range of supporting people aged 50+/45+ in the labour market in Poland.</p>	<p>Using a wide range of possibilities to support people aged 50+/45+ in the labour market, tested within the programme, makes it possible to better adapt the offers to the needs and abilities of older people.</p> <p>The experience of financial perspective 2004 — 2006 and the initial financial period of 2007 — 2013 shall help to use the resources for supporting people aged 50+/45+ more accurately till 2013.</p>	<p><b>Labour Market Institutions (IRP)<sup>a/</sup></b></p> <p>Projects including an innovative and at the same time more risky component connected with a support method of economic activation of people aged 50+/45, e.g. in the form of job coaching, should deserve a greater distinction than standard offers; it is necessary to include the EQUAL results worked out by projects oriented on supporting people at an immobile age as a strategic criterion in Human Capital Operational Programme competitions, especially if the access criterion distinguishes people aged 45+ as a target group. Simultaneously, it is recommended to accept a point evaluation high enough to make it a measurable encouragement for beneficiaries.</p> <p>Labour Market Institutions are expected to seriously engage in popularisation of the lifelong learning idea, e.g. through meetings with the youth or promoting attitudes of older people who decided to start formal education. It is also necessary to work out rules (Minister of Labour with cooperation of especially Ministers of Education and Higher Education) of gaining certificates by people who, facing a special state commission, would like to confirm their qualifications gained in an informal way; it is important that, e.g. voivodeship employment offices, which coordinate activities within lifelong learning and training of people who are unemployed and who are looking for a job, give their support.</p> <p>Lifelong learning promotion confirmed by such activities as organising training for people aged 50+ who are out of the labour market should be addressed to training institutions, social dialogue institutions, especially to trade unions, employers organisations, the unemployed organisations and local partnership organisations and institutions; the role of employment offices and agencies in turn is to promote and popularise materials explaining the essence of flexible forms of employment and their benefits for activating people aged 50+/45+, e.g. through distribution of informative materials (brochures, handbooks) in which advantages of flexible employment forms and working time would be indicated; simultaneously one should more extensively popularise the already existing materials promoting flexible employment forms and/or order them, e.g. within the framework of projects submitted by higher education institutions or the Labour and Social Issues Institute (the unit supervising the Institute is the Ministry of Labour and Social Policy).</p>

Suggested Recommendations		Recipient and Suggested Way of Acting	
		Labour Market Institutions (IRP) <sup>a/</sup>	Institutions of social assistance and social integration (ISAS) <sup>b/</sup>
Summary Conclusions	Recommendation and Its Purpose	Justification	
<p>Trainings and other activities offered within the framework of support programmes which are connected with the necessity to adapt the qualifications profile of people aged 50+ /45+ to the needs of economy based on knowledge should be considered justified and desirable.</p> <p>Participation in projects realised within the frameworks of international programmes financed with European sources increases the ability to support initiatives directed to activation of people aged 50+ /45+; their effectiveness was, however, diverse because in projects realised within framework programmes (VI, VII, VIII) with participation of Polish institutions the issues of supporting people aged 50+ in the labour market and in society was not brought up very often; whereas the participation in the Lifelong Learning Programme had a positive influence.</p>	<p>It is recommended to increase the availability of IT trainings and adapt them to their subject matter and their form to the needs of employers, first of all of the SME sector.</p> <p>AIM Further popularisation of IT qualifications among people of productive age, according to the economy modernisation direction.</p> <p>To support activities on Equalising opportunities on the labour market for people aged 50+ /45+ one should use benefits, which are brought by intergeneration and intercultural knowledge transfer.</p> <p>AIM Increase of effectiveness of support programmes for people aged 50+ /45+ in the labour market realised within the international projects.</p>	<p>Despite achievements in the area of participation of people aged 50+ /45+ in trainings adapting their qualifications to the needs of IT economy, it is still too little in relation to the incoming challenges of the economy based on knowledge.</p> <p>Striving for taking advantage of cultural and demographic conditions for increasing the effectiveness of projects supporting people aged 50+ /45+ in the labour market.</p>	<p>To consider covering the biggest possible group of people aged 50+ by basic training on computer literacy — it is a recommendation directed to District Employment offices, training institutions and NGOs. It is also important to take into consideration specialist computer training in the training and consultancy activities block, allowing developing IT abilities required by a given profession.</p> <p>District Employment offices and voivodeship employment offices should take into consideration the intergeneration and intercultural aspects upon realisation of projects supporting people aged 50+ /45+ in the labour market through — on one hand — including older and younger age groups as beneficiaries of the same projects, as well as by creating opportunities of more frequent contacts with citizens of other partner states. This evokes a bigger openness of the project participants within variety management both at work and in a region, which is necessary to improve the opportunities of people aged 50+ /45+ in the labour market. A good solution is a broader usage of telematic tools, inclusive of widely available internet communicators in contacts of project participants previously initiated in a traditional, direct way. It is of a special significance in the case of international cooperation.</p>



Summary Conclusions	Suggested Recommendations		
	Recommendation and Its Purpose	Justification	Recipient and Suggested Way of Acting Labour Market Institutions (IRP) <sup>a/</sup> Institutions of social assistance and social integration (ISAS) <sup>b/</sup>
<p>Too small popularisation of information on projects realised in Poland and those including an international component.</p>	<p>It is advisable to create a platform for information exchange, a solution and project "product" bank having a more long-lasting formula; the knowledge management formula concerns all previously realised projects.</p> <p>AIM</p> <p>Development of the Labour Market Institutions and Institutions of social assistance and social integration' structural capital, which covers the human inventiveness, results taking a form of various products, recorded procedures and other values made during the projects realisation process.</p>	<p>Many other valuable initiatives, innovative solutions worked out in projects within programmes disappear with time and they should constitute a valuable component of the Labour Market Institutions structural capital, serving for practices aimed at improvement of the situation of people aged 50+/45+ in the labour market in a regional and local contexts.</p>	<p>Creating a repository of information, worked out project "products", a solution and experience bank, and taking care for its durability — this is a task of Voivodeship Offices which may gain resources from the Labour Fund with a purpose of implementation, development and exploitation of the telematic system and digital technologies in voivodeship offices serving for realisation of task arising from the Act on Employment Promotion (article 109, section 4, item 2). Such a repository (having a form of a portal, i.e. a special thematic portal) should be available on-line for everyone interested in equalisation of opportunities for people aged 50+ in the labour market.</p>

Summary Conclusions	Suggested Recommendations		
	Recommendation and Its Purpose	Justification	Recipient and Suggested Way of Acting Labour Market Institutions (IRP) <sup>a/</sup> Institutions of social assistance and social integration (ISAS) <sup>b/</sup>
Supporting people aged 50+/45+ often is not connected with finding a job.	Offering support covering – aside from training and consultancy activities – professional internship or professional preparation for adults. Adapting training to the requirements of job positions to which the internship/in-service training participant is sent.	It is advisable that sending to a training is connected with a specific job offer and that it is realised individually – institutional barriers connected with it arise from the fact that the District Employment offices are heavily burdened with work which often makes it impossible to handle the issues individually. Employers more and more often require an extensive professional preparation of employees which increases their flexibility at work but makes it more difficult to adapt a training offer to the needs of an employer and abilities of a concrete unemployed aged 50+/45+; there is a lack of a good diagnosis of the employers' needs which leads to idleness <sup>c/</sup> .	Beneficiaries applying for support within the Human Capital Operational Programme and Civil Initiatives Fund (first of all employment offices, institutions of social assistance and social integration and NGOs) should take into consideration in the prepared applications – aside from activities connected with individualised professional trainings and psychological support – also chosen forms of employment. It concerns especially people of younger immobile age groups (45 – 55 years old). Taking into consideration appropriate entries, promoting such solutions, in activity plans of operational programmes, especially the Human Capital Operational Programme, will be beneficial for it.  Public Employment Institutions should start a closer cooperation with employers' organisations (Employers of Poland, Polish Confederation of Private Employers Lewiatan, Polish Craft Association, Business Centre Club – Employers Association) in order to better diagnose the needs of employers within the area of adapting the training offer (form) giving a possibility to keep people employed/return them to work.

Summary Conclusions	Suggested Recommendations			Institutions of social assistance and social integration (ISAs) <sup>b/</sup>
	Recommendation and Its Purpose	Justification	Recipient and Suggested Way of Acting Labour Market Institutions (IRP) <sup>a/</sup>	
Support for people aged 50+ /45+ is often not adapted to the specific needs of this age group.	Preparation of employees of public employment institutions and social welfare units for work with people aged 50+, especially those who have been unemployed for a long period of time.	Employees of District Employment offices, Municipal Social Welfare Centres, Municipal and Commune Social Welfare Centre and Commune Social Welfare Centres, directing people aged 50+ (or 45+) to participation in activation activities are not appropriately prepared for work with this specific group of people.	It is necessary to organise training improving Public Employment Institutions and Institutions of social assistance and social integration employees within work with the unemployed and/or socially excluded aged 50+/45+ and to exchange good practices with other institutions having much richer experience in this area. The source of financing such initiatives should be the resources of the Human Capital Operational Programme for system projects, inclusive of: Priority I and Measure 7.1 of Priority VII.	
Within many of these projects whose activities are addressed mainly to people aged 50+ who have already retired, the support covers only general-development activities which, however, may in further perspective contribute to a bigger economic activity of older participants.	Supplementing the offer within the Civil Initiative Fund, Priority VII and IX of Human Capital Operational Programme and Lifelong Learning Programme with activities directly connected with economic activation.	Expanding the support offer with professionally activating activities should contribute to professional re-activation of older people.	Beneficiaries applying for support within Priorities VII and IX of the Human Capital Operational Programme, Civil Initiatives Fund and the Gruntwig Programme (inclusive of especially institutions of social assistance and social integration and NGOs) – aside from the previously considered integration activities and financing of the University of Third Age activities – should introduce to their offer workshops in economic activation whose effect should be a broader inclusion of participants – older people – in professional and social activities (especially through taking advantage of flexible employment forms and working time, as well as through voluntary service). The workshops should concentrate on “soft” aspects (workshops developing interpersonal skills, motivation, etc.) but also on entrepreneurship. It requires creating encouragement in the form of additional points at the stage of content related evaluation of applications on subsidization (in the case of national programmes).	

a/ To Labour Market Institutions belong (Chapter 3, article 6 of the Act on Employment Promotion and Labour Market Institutions of 20th April 2004): public employment institutions (employment organs with commune and voivodeship employment offices, an office serving the Minister of Labour with the voivodeship offices); Voluntary Labour Corps (a unit specializing in activities for the youth); employment agencies; training institutions; social dialogue institutions (trade unions or trade unions organisations, employers organisations, the unemployed organisations, non-governmental organisations — if among their statutory activities there are realisation of activities connected with employment promotion, alleviation of unemployment effects and economic activation); local partnership institutions (a group of institutions carrying out in the labour market enterprises and projects on the basis of a contract). b/ To Institutions of social assistance and social integration belong (article 6, item 5 of updated Act on Social welfare of 12th March 2004): regional social policy centres; commune family support centres; social welfare centres; social welfare homes; special consultancy institutions, inclusive of family consultancy; guardian and educational institutions; adoption and guardian institutions; support centres; crisis intervention centres. c/ The idleness effect, called also the unnecessary social loss effect, occurs in a situation when the participation of an unemployed person in a programme aimed at helping them in finding a job does not result in finding a job, e.g. they start working in positions not connected with the type of training they have undergone. More on side effects of the active labour market policy in Z. Wsniowski, K. Zawadzki, *Aktywna polityka rynku pracy w Polsce w kontekście europejskim (Active Labour Market Policy in Poland in the European Context)*, voivodeship employment office in Toruń, Nicolaus Copernicus University, Toruń 2010, p. 114.

Source: Self-study.

On the basis of previous considerations the following conclusions can be drawn:

As people aged 50+ have been included in groups facing a special situation in the labour market, the public employment institutions have now many possibilities at their disposal to support this category of the unemployed and employed. Employment offices are obliged to take up activation activities towards the unemployed aged 50+ and should within 6 months from the registration date present an employment offer or another type of remunerated activity or one of economic activation forms — training, internship, professional preparation for adults, intervention or public works. Activation and employment support is carried out by public employment institutions and complemented by activities taken up by non-public organisations — training institutions and employment agencies. Resources for financing the taken up initiatives are taken from both national Labour Fund resources and structural funds, inclusive of especially the European Social Fund. As research has proven, in 2004–2009, activities addressed to the analysed beneficiaries group were not especially stressed in programme documents, and thus they were not taken up very often. The last years the situation improved, however, the activities require further popularisation and intensive actions aimed at:

- 1) social climate change concerning employment of people at immobile productive age (45+);
- 2) attitude change of people aged 50+/45+ towards their own situation in the labour market and towards further education in order to expand their professional and interpersonal competences;
- 3) development of public employment institutions workers competences (especially at the regional and local level) in the area of running activities for equalisation of opportunities of people aged 50+ in the labour market in Poland — from the stage of designing (in Regional Action Plan for Employment and regional and local strategic documents programming the labour market policy and social policy, and in Action Plans of regional component of Human Capital Operational Programme), through standards of working with people aged 50+ and ending on monitoring the labour market situation of people aged 50+/45+ (inclusive of after graduation from activation activities);
- 4) intensification of cooperation of stakeholders engaged in labour market and social policy realisation, especially on the local level;
- 5) popularisation of good solutions within equalisation of opportunities of people aged 50+/45+ in the labour market in Poland on the basis of previous experience of institutions realising enterprises addressed to people aged 50+/45+ and on the basis of good practices — both institutional and project ones — of other European countries.

To the realisation of these demands the project *Equalising Opportunities on the Labour Market for People Aged 50+* shall be conducive. This project projects not only a far-flung informative and promotional campaign supported by multifaceted research but also trainings for public employment institutions employees and institutions of social assistance and social integration. Constituting one of the components of the programme *Solidarity across generations. Measures aiming at increasing the economic activity of people over 50*, the project is a part of far-flung activities for employment of people aged 50+ in Poland.

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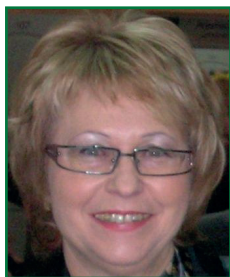
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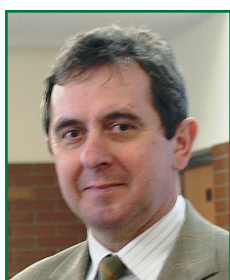
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## List of Applied Abbreviations

LFS	Labour Force Survey
EB	End Beneficiary
ESF	European Social Fund
EEA	European Economic Area
CFF	Cooperation Fund Foundation
CIF	Civic Initiatives Fund
LF	Labour Fund
GEBF	Guaranteed Employee Benefits Fund
CSO	Central Statistical Office
LMI	Labour Market Institutions
EQUAL CI	EQUAL Community Initiative
ISASI	Institutions of social assistance and social integration
NAPE	National Action Plan for Employment
LdV	Leonardo da Vinci
LLP	Lifelong Learning Programme
ILO	International Labour Organisation
MLSP	Ministry of Labour and Social Policy
NGO	Non-Governmental Organisation
OECD	Organisation for Economic Co-operation and Development
PAED	Polish Agency for Enterprise Development
PHARE	Poland and Hungary: Assistance in Restructuring their Economies
EQUAL CIP	EQUAL Community Initiative Programme
HC OP	Human Capital Operational Programme
FP	Framework Programme
PEO	Poviat Employment Office
RAPE	Regional Action Plan for Employment
SOP HRD	Sectoral Operational Programme Human Resources Development
VEO	Voivodeship Employment Office
IROP	Integrated Regional Operational Programme





## Appendix A. Sample Project Card

Contract No.: POKL.08.01.01-02-103/09-01

<b>Project Title</b>		<b>Welding According to European Standards — a Recipe for New Life</b>
<b>Beneficiary's Name</b>		WZDZ Szczecin
<b>Adres beneficjenta</b>	Voivodeship	Zachodniopomorskie
	commune	Szczecin
	commune	Szczecin
	street	Pl. Kilińskiego
	house number	3
	apartment number	
	Zip code	70-965
	Post office	Szczecin
<b>Dane kontaktowe</b>	<b>tel.</b>	91 450 12 01
	<b>fax</b>	91 450 17 11
	<b>e-mail</b>	info@wzdz.pl
<b>WWW</b>	<b>of beneficiary</b>	www.wzdz.pl
	<b>of project/ information on project</b>	www.wzdz.szczecin.pl/projekty/projekt.php?id=5
<b>Project value</b>		PLN 598 663.00
<b>Source of financing</b>		HC OP 6.1.1.
<b>Institution responsible for project implementation</b>		Voivodeship employment office in Szczecin
<b>Project type</b>	<b>competition</b>	yes
	<b>transnational</b>	no
	<b>innovative</b>	no
<b>Project realisation deadline</b>		01.07.2008 – 31.12.2009
<b>Territory on which the project was implemented</b>		Zachodniopomorskie Voivodeship

<b>Project description</b>	<b>General purpose</b>	Motivating 40 unemployed people to start economic activity		
	<b>Detailed purpose</b>	Supporting people entering and re-entering the labour market. Supporting 40 unemployed people up to 25 years old and over 45 years old with training appropriate for the specific character of the regional labour market — welding training. Increasing the abilities and competitiveness of unemployed people at the labour market through supporting them with language training. Increasing the employment rate among people of 25 and over 45 years old.		
	<b>Activities</b>	<p><b>Project management</b></p> <p><b>Participants promotion and recruitment</b></p> <p><b>Pre-training consultancy</b> — the purpose of the pre-training consultancy was carrying out a profession-directed diagnosis of the beneficiary. The diagnosis was meant to define the level of professional preparation, qualifications and professional abilities. The training — the project participants were covered by a professional training in the area of welding sheets and pipes with fillet welds with the use of the MAG (135) method material group 1 with English/German.</p> <p><b>Post-training consultancy</b> — the purpose of the post-training consultancy was shaping active attitudes of participants in looking for a job, inclusive of: overcoming obstacles and difficulties and persistence in actions.</p> <p><b>Employment agency</b> — the project graduates had a possibility to take advantage of employment office in WZDZ. All interested persons were registered in a database of people looking for a job. The employees of the agency took up activities targeted at increasing the possibility of the training graduates to find a job.</p> <p><b>Organising a conference summing up the project</b> — upon the end of the project a conference was organised to which all training participants were invited. During the meeting the project was summed up and further educational possibilities and possibilities to increase the knowledge and welders' qualifications were presented.</p>		
<b>Target groups</b>	<b>Explanation concerning People Aged 45+/50+</b>	People not registered in the District Employment Office as unemployed for a period of at least 3 months from the moment of starting the project, people registered in the District Employment Office for over 12 months.		
	<b>Number of beneficiaries (Total/ 50+ or 45+)</b>	40/25		
<b>Results</b>		<b>Indicator name</b>	<b>Target value</b>	<b>Realised value</b>
	<b>“Hard” results</b>	Number of recruited unemployed persons	40	40
		Number of organised trainings	4	4
		Number of trained persons	40	40
		Number of persons who graduated from the professional training in the area of welding	40	40
		Number of gained welding licences	40	40
		Number of certificates confirming finishing the TUV SUD training in English or German	40	40
		Number of training hours	145	145
		Number of persons graduating from the language training	40	40
	<b>“Soft” results</b>	Number of persons who understood the importance of investing in themselves in order to change their fate	40	40
		Number of persons who have felt like fully fledged citizens	40	40
		Number of persons who increased their abilities and professional predispositions, and who motivated themselves to start economic activity	40	40
		Number of persons whose self esteem increased and who gained courage to move freely on the open labour market	40	40

<b>Strong points of the project</b>	Preparation of the Target Beneficiary (BO) to pass an exam allowing gaining a welding licence from the theoretical and practical point of view. Certificate of graduating from the TUV SUD training in English or German which is an additional advantage while looking for a job and sending CVs to foreign companies. A specialized language course enhancing communication with foreign employers. Covering the travel, state examination, accommodation and training material costs.
<b>Weak points of the project</b>	Not indicated
<b>Reasons for a possible failure in realisation of results indicators</b>	does not concern
<b>Other information (e.g. participation in competitions, prizes, other)</b>	does not concern
<b>Conclusion</b>	The project allowed gaining welding abilities and necessary licences, drawing, however, attention to the necessity to use special foreign vocabulary. However, the professional trainings are only the first part of the whole enterprise. WZDZ took care also for such aspects as introduction of the newly trained persons to the labour market. The project initiator carried out post-training consultancy in the area of overcoming difficulties and obstacles while looking for a job. Each interested target beneficiary could also be registered in a database of people looking for a job. All assumed indicators of "hard" and "soft" results were realised. The cost per one participant — PLN 14 996.57.

Source: self-study.



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