



WYRÓWNYWANIE SZANS
NA RYNKU PRACY DLA OSÓB 50+

The methodological annex for Polish labour market for women and men aged **50+** - Diagnosis Final report

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Łódź 2013



HUMAN CAPITAL
NATIONAL COHESION STRATEGY



EUROPEAN UNION
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"Equal opportunities in the labour market for people aged 50+"
Project co-financed by the European Union within the European Social Fund

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and Social Policy

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Introduction

This document constitutes a methodological annexe for the publication entitled “*Polish labour market for women and men aged 50+ - Diagnosis. Final report*”. The methodological annexe includes a description of guidelines and principles for carrying out the primary research (field research) conducted within the framework of the diagnosis of the current situation of women and men aged 50+ on the labour market in Poland (hereinafter referred to as the *Diagnosis*). Hence, it constitutes an elaboration of Chapter 1. *The methodological characteristics of the research*.

It should be emphasized that the idea of the *Diagnosis* was drafted by an interdisciplinary team from the University of Łódź (UŁ) – a Partner of the project “Equal opportunities in the labour market for people aged 50+”. The guidelines of the project, its objectives, the rules for the selection of respondents’ groups, the research methodology as well as research instruments were prepared by the UŁ team and were accepted by the initiating department - Department of Economic Analyses and Forecasts of Ministry of Labour and Social Policy.

The field research of the *Diagnosis* was carried out by the consortium IBC GROUP Central Europe Holding S.A. & ARC Rynek i Opinia Sp. z o. o (hereinafter referred to as research company) chosen by means of tender procedures. In accordance with drawing 1, the research company hold methodological consultations regarding the idea of the research (particularly concerning the research instruments) and specified the rules of sampling for specific research areas¹. The research company also carried out a pilot testing which helped to verify the research instruments. The conclusions gathered from the pilot testing, included in the reports prepared by the research company and submitted by the UŁ team and the project Experts’ Council, were taken into consideration by the Partner’s team which corrected the research instruments.

After taking into account the discussed changes, the research company conducted field research. The qualitative study of employers was carried out after a preliminary analysis of this group’s quantitative research results (afterwards the necessary changes into the scenario were introduced, the pilot testing was carried out, the rules of sampling were specified and the actual research conducted). The research company also drafted the preliminary results of the study by the individual research modules, including data bases in the SPSS format from the quantitative research, interviews’ transcripts, survey forms and prepared *Preliminary reports* tentatively reviewing the research results. The research company also carried out (in cooperation with the UŁ team) an expert panel discussion. The scope of the performed tasks should be emphasized – the work of the research company resulted in 18 documents, 2 data bases and over 5000 pages of interviews’ transcripts.

The commitment of the UŁ team during the stage of the field research of the *Diagnosis* also should be underlined. The cooperation with the research company took place at every stage of works. The issues regarding the content were reviewed and approved by the UŁ team before the commencement of the subsequent stages of the research. The representative of the UŁ team (a social research methodologist) also participated in trainings of the interviewers. The UŁ team also verified the source materials (parallel to the research company), issued opinions concerning the formal and substantive contents of the products prepared by the consortium.

In the subsequent stage of works of the *Diagnosis*, the UŁ team, the experts in separate research areas, conducted a detailed analysis of the research results. A partial report was drafted for each research area and it constituted a deepened study concentrating on the results of the field research, referring to the determinants of each group of subjects in the

¹ Compare: IBC GROUP Central Europe Holding S.A. & ARC Rynek i Opinia Sp. z o. o., *Raport metodologiczny Przeprowadzenie ogólnopolskiego badania służącego do opracowania diagnozy obecnej sytuacji kobiet i mężczyzn w wieku 50+ na rynku pracy w Polsce (Methodological report: Carrying out a nationwide study aiming at drafting Polish labour market for women and men aged 50+ - Diagnosis.)*, Warszawa 2012.

context of the economic activity of people aged 45+ and to the research data in this area gathered so far.

The works carried out under the *Diagnosis* are summarized in the final report which constitutes a synthesis of the extensive research for each group of stakeholders.

It has to be underlined that this *Methodological Annexe* does not constitute an entirely original study. The authors reviewed the prepared partial products from the perspective of the methodological aspects and drafted this Annexe, editing the above-mentioned materials and supplementing them simultaneously with the content necessary for the recognition of the methodology used in the performed research of the *Diagnosis*.

For the needs of the Annexe, the following internal materials, prepared within Task 3 of the Project "Equal opportunities in the labour market for people aged 50+" have been used (the following list was drafted on the basis of the importance of a given document to the methodology of the research):

1. The idea of empirical study in the area of *Polish labour market for women and men aged 50+ - Diagnosis* within the project "Equal opportunities in the labour market for people aged 50+", Łódź 2011;
2. Terms of reference – attachment no. 1 in the tender documents of the research service entitled "*Carrying out a nationwide study aiming at drafting the diagnosis of the current situation of women and men aged 50+ in the Polish labour market*", prepared by the team of the University of Łódź (procurement announcement of 21st October 2011);
3. Methodological report *Carrying out a nationwide study aiming at drafting the diagnosis of the current situation of women and men aged 50+ on the labour market in Poland* drafted by the team of consortium IBC GROUP Central Europe Holding S.A. & ARC Rynek i Opinia Sp. z o. o., Warszawa 2012;
4. A. Kubiak, A. Krzewińska, the University of Łódź, *The methodological characteristics of the research under Polish labour market for women and men aged 50+ - Diagnosis*, Łódź 2012
5. A. Mikulec, the University of Łódź, *A proposition of districts classification based on conditions of the local labour market regarding people aged 45+ using the cluster Diagnosis*, Łódź 2012;
6. Preliminary reports on the research conducted within the individual modules:
 - a. P. Mielczarek, ARC Rynek i Opinia Sp. z o. o., *The preliminary report on CAPI quantitative research carried out among people at the age 45+ within the nationwide research – Polish labour market for women and men aged 50+ - Diagnosis*, Warszawa 2012;
 - b. P. Mielczarek, ARC Rynek i Opinia Sp. z o. o., *The preliminary report on CATI quantitative research carried out among employers within the nationwide research – Polish labour market for women and men aged 50+ - Diagnosis*, Warszawa 2012;
 - c. B. Uglik-Perowicz, IBC GROUP Central Europe Holding S.A., *The preliminary report on CAPI qualitative research carried out among employers within the nationwide research – Polish labour market for women and men aged 50+ - Diagnosis*, Warszawa 2012;
 - d. P. Matuszewski, IBC GROUP Central Europe Holding S.A., *The preliminary report on individual in-depth interview (IDI) qualitative research carried out among district labour offices within the nationwide research – Polish labour market for women and men aged 50+ - Diagnosis*, Warszawa 2012;
 - e. A. Stanaszek, IBC GROUP Central Europe Holding S.A., *The preliminary report on individual in-depth interview (IDI) qualitative research carried out among employment agencies within the nationwide research – Polish labour market for women and men aged 50+ - Diagnosis*, Warszawa 2012;
 - f. P. Matuszewski, IBC GROUP Central Europe Holding S.A., *The preliminary report on individual in-depth interview (IDI) qualitative research carried out among training in-*

- stitutions within the nationwide research – Polish labour market for women and men aged 50+ - Diagnosis, Warszawa 2012;*
- g. M. Zarzecki, IBC GROUP Central Europe Holding S.A., *The preliminary report on individual in-depth interview (IDI) qualitative research carried out among organizational units of social welfare within the nationwide research – Polish labour market for women and men aged 50+ - Diagnosis, Warszawa 2012;*
 - h. K. Sinkowska-Kalinowska, IBC GROUP Central Europe Holding S.A., *The preliminary report on individual in-depth interview (IDI) qualitative research carried out among non-governmental organizations within the nationwide research – Polish labour market for women and men aged 50+ - Diagnosis, Warszawa 2012;*
7. T. Skierniewski, IBC GROUP Central Europe Holding S.A., *Report on experts panel discussion carried out within the nationwide research – Polish labour market for women and men aged 50+ - Diagnosis, Warszawa 2012;*
 8. Piwowarski R., the University of Łódź, *Characteristics of sampling and procedures guaranteeing the compliance of the sampling structure with the guidelines of the methodological report (on the basis of the results of the employers quantitative research in Diagnosis of the current situation of women and men aged 50+ on the labour market in Poland), Łódź 2012;*
 9. Wiktorowicz J., the University of Łódź, *Methodological guidelines of the quantitative research of people aged 45+ (on the basis of results of the quantitative research of people aged 45+ in Diagnosis of the current situation of women and men aged 50+ on the labour market in Poland), Łódź 2012;*
 10. Reports on the pilot testing carried out within the frameworks of individual modules:
 - a. IBC GROUP Central Europe Holding S.A. & ARC Rynek i Opinia Sp. z o. o., *Report on the pilot testing of CAPI quantitative research with people aged 45-69, Warszawa 2012;*
 - b. IBC GROUP Central Europe Holding S.A. & ARC Rynek i Opinia Sp. z o. o., *Report on the pilot testing of CAPI quantitative research with employers, Warszawa 2012;*
 - c. IBC GROUP Central Europe Holding S.A. & ARC Rynek i Opinia Sp. z o. o., *Report on the pilot testing of qualitative research carried out with employers, Warszawa 2012;*
 - d. IBC GROUP Central Europe Holding S.A. & ARC Rynek i Opinia Sp. z o. o., *Report on the pilot testing of qualitative research carried out with district labour offices , Warszawa 2012;*
 - e. IBC GROUP Central Europe Holding S.A. & ARC Rynek i Opinia Sp. z o. o., *Report on the pilot testing of qualitative research carried out with employment agencies, Warszawa 2012;*
 - f. IBC GROUP Central Europe Holding S.A. & ARC Rynek i Opinia Sp. z o. o., *Report on the pilot testing of qualitative research carried out with training institutions, Warszawa 2012;*
 - g. IBC GROUP Central Europe Holding S.A. & ARC Rynek i Opinia Sp. z o. o., *Report on the pilot testing of qualitative research carried out with organizational units of social welfare, Warszawa 2012;*
 - h. IBC GROUP Central Europe Holding S.A. & ARC Rynek i Opinia Sp. z o. o., *Report on the pilot testing of qualitative research carried out with non-governmental organizations, Warszawa 2012.*

The methodological annexe aims to familiarize the reader with the adopted guidelines of the research, the objectives of the *Diagnosis*, rules of sampling, the manner of research realization and research instruments.

1. General guidelines of the research

1.1. Introductory remarks

Polish labour market for women and men aged 50+ - Diagnosis constitutes one of the elements of a more extensive research project carried out between 2010–2013 by the University of Łódź – a partner of the project “Equal opportunities in the labour market for people aged 50+”. Older employees remain the subject of the research. It was decided – taking into consideration all reservations resulting from the discussion over this notion – that the term “older people” shall refer to people aged 45+.

Upon reviewing literature, no distinct guidelines determining the bottom age limit of the older employees were found. In some publications it is 50 years (compare e.g. Rysz-Kowalska i Szatur-Jaworska 2007, Manpower 2008), in others – 45 years (compare e.g. Urbaniak 2007); many publications suggest the age of 55 years (the definition of an older employee in the analyses prepared for the European Commission till recently included people aged 55-64, but newer publications introduce the bottom limit of 50 years).

It should be pointed out that the objectives of the Project “Equal opportunities in the labour market for people aged 50+” are generally directed at people aged 50+. Two main objectives were adopted: (1) promotion of economic activity among women and men aged 50+ and (2) promotion of actions extending the economic activity. The limit 50+ is in compliance with the guidelines of the programme *Solidarity between generations. Actions aiming at increasing the economic activity among people aged 50+* (hereinafter referred to as *Solidarity between generations programme*) whose one of the essential elements is the project “Equal opportunities in the labour market for people aged 50+”. As a result, the research approach adopted within the framework of the actions of the project’s Partner takes into account the main guidelines of the *Solidarity between generations programme*, according to which: *the increase in the employment rate among people 50+ is necessary in order to maintain the high economic growth in Poland for next dozen years. A part of solutions suggested in the programme is aimed at younger people, after the age of 45. It results from the evaluation of the experts and practitioners who point out that maintaining the economic activity of people aged 50 and more requires suitable steps also in regard to younger people*².

It is necessary to begin the preparation process for people approaching the pre-retirement period of occupational life earlier. Thanks to the actions aimed at people aged 45 and more, which involve them into a wide-profile adaptation process, they can prepare for changes, including renewing and broadening competences. It will allow to strengthen their position in the labour market - the internal and external one – depending on the individual situation. The age of 45+ demarcates also the beginning of the immobile working age, which additionally proves the validity of the adopted guidelines.

The adopted approach allows to maintain the complementarity of research with regard to other research works under the project “Equal opportunities in the labour market for people aged 50+” which features the analysis of the employment situation as early as aged 45+.

The analysis of situation of women and men aged 45+ on the Polish labour market requires including in the research all the participants of the market, both the supply sector and the demand sector. That is why the research included also the most important stakeholders: people aged 45+, employers, labour institutions involved in the issues of the economic activation, organizational units of social welfare, non-governmental organizations. Such approach allowed to comprehensively analyse the situation of people aged 45+ in Poland, and

² *The Programme “Solidarity between generations. Measures aiming at increasing the economic activity of people over 50”*

particularly to evaluate the operation of the network of institutions supporting the economic activity of those people. The obtained comprehensive and multi-aspect image of the analysed phenomena allowed for drafting appropriate recommendations within the area of systemic solutions with regard to this group of people.

The analysis was conducted taking into consideration the triangulation of the research methods. The field research constitutes the essential element of the Diagnosis. It was preceded by a diversified desk research (in 2010) in the area of determinants of people aged 45+ in Poland which included – apart from the research conducted in Poland and abroad – the analysis of:

- the situation of people aged 45+ in the labour markets in Poland and other countries of the European Union (taking into account demographic factors);
- legal determinants helping to provide equal opportunities for people from this age group;
- operations planned in the strategic documentation and programmes concerning the issues of people aged 45+ (including 50+) in the labour market in Poland (on the state and local levels);
- operations of social dialogue in the area of issues concerning people aged 45+ on the Polish labour market;
- operations carried out by non-governmental organizations aiming to provide equal opportunities on the Polish labour market.

The results of the conducted desk research were used at the stage of planning the field phase of the Diagnosis research.

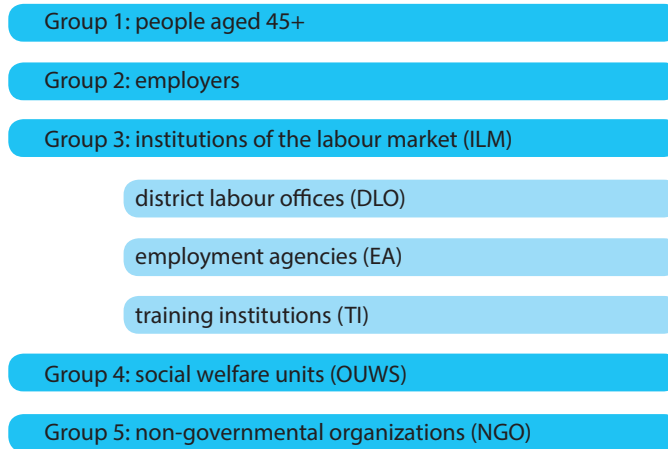
1.2. Objectives of the *Diagnosis*

The main objective of the *Diagnosis* is to describe and evaluate the situation of women and men aged 45+ on the Polish labour market, including the evaluation of the role of the institutions supporting the economic activity of people aged 45+. The following detailed objectives were incorporated into the main objective:

1. the evaluation of the occupational and social situation of women and men aged 45+ in Poland;
2. the evaluation of the attitudes of people aged 45+ regarding their own economic activity;
3. the evaluation of the attitudes of employers regarding employing people aged 45+;
4. the evaluation of the support for economic activation of people aged 45+ provided by the institutions of the labour market (ILM);
5. the evaluation of the support for economic activation of people aged 45+ provided by the organizational units of social welfare (OUSW);
6. the evaluation of the scope of the support for economic activation of people aged 45+ provided by the non-governmental organizations (NGO);
7. the identification of barriers and opportunities for economic activation of women and men in Poland;
8. gathering conclusions and recommendations regarding the systemic solutions in the area of providing equal opportunities for people aged 45+ on the Polish labour market.

The adopted objectives required undertaking an extensive research involving various groups of stakeholders (compare: drawing 1).

Drawing 1. List of research subjects



Source: own elaboration.

1.3. Guidelines for the selection of respondents' groups

Group 1. People aged 45+

Under the notion of a person aged 45+, one should understand a person aged 45-69 years, holding Polish citizenship and residing in Poland during the research. Taking into consideration the fact that the research was carried out during the first half of 2012, the subjects of the research were born between 1943-1967.

The justification for adopting the bottom limit with regard to „older” people (in the context of their occupational situation) on the level of 45 years can be found in the *Introduction to the Annexe*. The adoption of the upper limit was justified by the demands for changing the retirement age to the level of 67 years which took place at the moment of formulating the guidelines of the *Diagnosis* (1st quarter of 2011). The changes in the retirement system³ confirm the adopted research guidelines. It is also important that after five years of reaching the retirement age, the number of women and men receiving the retirement benefit almost does not increase (cf. Deactivation of people at the pre-retirement age, Ministry of Labour and Social Policy, Warszawa 2008, p. 9), meaning that it is the age at which the majority of Poles have finished their economic activity. This *Diagnosis* – apart from the main aspect of the discussion i.e. the economic activity of “older” people – also takes into consideration issues connected with their education and non-occupational situation such as health, necessity of nursing a dependent member of family (child, elder person and/or people with disabilities), economic situation and social activity. These factors influenced the decision concerning the adoption of the same upper age limit both for the population of women and men.

Group 2. Employers

In the research part concerning the employers, the *Diagnosis* was aimed at recognizing the determinants responsible for the increase in the economic activity of older employ-

³ The Act amending the act on retirement and disability pensions from Social Insurance Fund and some other acts of 12 of 11th May 2012, Dz. U. 2012 no. 0 item 637, item 637.

ees from the perspective of opportunities occurring in enterprises, institutions, offices and non-governmental organizations. Fundamentally it was supposed to be of a complementary nature in relation to the results from earlier studies concerning the age management in enterprises prepared during the project organized by the Polish Agency for Enterprise Development (PAED) entitled "Benefiting from age – trainings for entrepreneurs". Simultaneously, a different research methodology, including the triangulation of the research methods (quantitative and qualitative research compared with qualitative research in case of the PAED project) and more extensive profile of the population constitute an added value in comparison to the mentioned research.

The population of employers, which is the subject of the research within the *Diagnosis*, includes not only enterprises but also public institutions and non-profit organizations employing at least one employee. An enterprise was understood as an entity conducting a business activity regardless of its legal form (pursuant to the regulation EC 800/2008, OJ of EU no. L 214 of 9 August 2008).

Pursuant to the Act on public finance of 27 August 2009 (Dz. U. 2009, no. 157, item 1240, article 9), public institutions (entities) included bodies of governmental administration, state audit bodies and law enforcement bodies, courts and tribunals, units of local governments and their associations, institutions of budgetary economy, state target funds, Social Insurance Institution and its funds as well as Agricultural Social Insurance Institution and funds managed by the Chairman of Agricultural Social Insurance Institution, National Health Fund, autonomous state health care centres, public universities, The Polish Academy of Science and its organizational units, state and local legal people established on the basis of separate acts in order to carry out public operations. Non-profit organizations are the organizations operating in the area related to the provision of services which because of their unprofitability are not provided by the sector of enterprises (the private sector) and are not offered or are offered in an insufficient degree by public institutions.

The adopted scope of the employers' population makes the planned research innovative – the research of employers conducted in Poland so far and carried out currently has not taken into consideration the diverse nature of the units creating the demand for work on the nationwide scale.

Group 3. Institutions of the labour market

Pursuant to the Act on promotion of employment and institutions of the labour market⁴, the institutions of the labour market (ILM) include: public employment service⁵, voluntary labour corps (VLC), employment agencies, training institutions, institutions of social dialogue, institutions of local partnership. Among the above-mentioned institutions of the labour market the most essential is to evaluate the district labour offices and employment agencies because of the need to reach the respondents involved into the employment of older people who are in a particular situation in the labour market (unemployed) on the one hand, and on the other hand – highly qualified. Because of their social capital, the highly qualified staff is often recruited from the group 45+. The employment agencies offering their service pursuant to the regulations of the Act on promotion of employment and institutions of the labour market have contact simultaneously with employers and older people searching for jobs. Taking into consideration the fact that in the period of last couple of years the number of

⁴ The Act on promotion of employment and institutions of the labour market of 20 April 2004, consolidated text, Dz.U. of 2004 no. 99, item 1001 as amended.

⁵ Pursuant to the Act, the public employment service (PES) in Poland are the employment bodies (the minister competent for labour issues, province governors, province marshals and starosties) together with district and province labour offices, the office of the minister competent for labour issues and province offices carrying out operations defined by this act.

employment agencies increased several times on the nationwide scale, they have become very important entities in the labour market. Additionally, it is worth underlining that DLOs will constitute very important subjects of the research also because of the fact that they are one of the most important entities realizing the projects of economic activation of people aged 45+.

From the perspective of the project objectives, the training institutions also constitute a very important group of institutions of the labour market because of their direct influence on the promotion of offered training services increasing their availability as well as improving the quality of training services which favour the economic activation of people aged 45+ on the Polish labour market.

Research among other institutions of the labour market was not conducted. That is why it should be explained why province labour offices (PLO), institutions of social dialogue and local partnership were not taken into account. Province labour offices do not deal with direct performance of active programmes of the labour market aimed at people aged 45+, which made us exclude them from the research. An important argument is also the fact that the identification of the operations aimed at people aged 45+/50+ on the province level has been already done for the needs of the execution of Task 1 within this project⁶. Furthermore, the institutions of social dialogue deal with shaping the direction of the programme operations and have rather an advisory function and are not decision-making entities. The exclusion of VLCs seems quite obvious.

These factors decided about the limitation of the research among ILM to three above-mentioned groups of entities – DLOs, employment agencies and training institutions.

Group 4. Organizational units of social welfare

The research includes also the organizational units of social welfare operating for the benefit of people aged 45+ in the area of their residence. Pursuant to the Act on social aid of 12 March 2004 (Dz. U. 2004, no. 64, item 593 as amended), an organizational unit of social welfare can be: regional centre for social policy, district family support centre, social welfare centre, care and nursing centre, facility of specialist counselling, including family counselling, educational care facility, adoption and care centre, support centre and crisis intervention centre. Because of the objective of the research, it includes also units of so called community assistance – commune centres of social welfare, city centres of social welfare, city-commune centres of social welfare and city centres of family support as well as regional facilities of social welfare and regional centres of social welfare. The research included institutions diversified in terms of organization and development of the services which are the subject of the research, taking into consideration the criterion of the urbanization degree of a given area.

Group 5. Non-governmental organizations

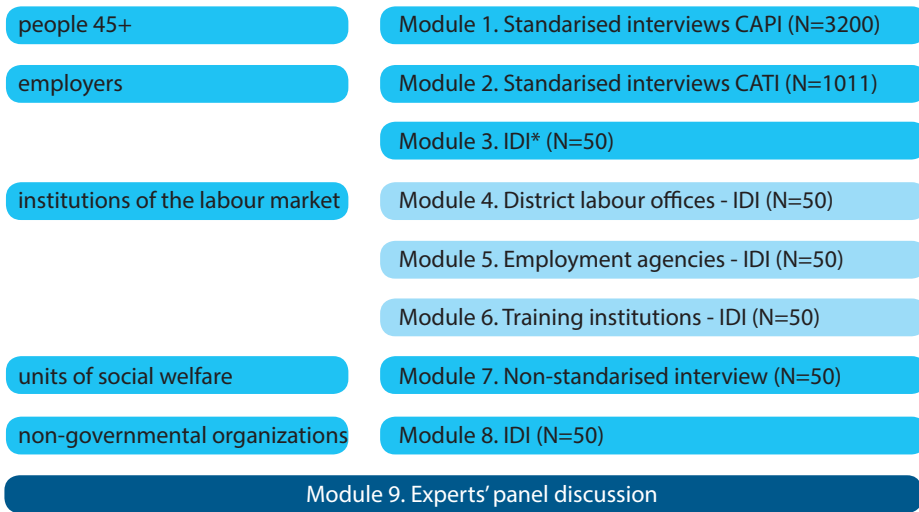
The research included non-governmental organizations which after 2004 carried out or currently carry out projects (i.e. carried out operations or carry out operations) connected with the economic activation of people aged 45+. The research did not limit itself to the organizations that carried out operations strictly aimed at people aged 45+ – the boundary condition for the selection of entities was the inclusion of people aged 45+ into activation operations – as beneficiaries of the carried out projects and other activities of the organizations as well as volunteers or employees.

⁶ Urbaniak B., J. Wiktorowicz, An analytical Report on Programmes for People 50+ Implemented in Poland between 2004 and 2009, Łódź 2011.

1.4. Triangulation of research methods

The research of the *Diagnosis* included both quantitative as well as qualitative methods. The field stage was preceded by the qualitative desk research. Both sides of the labour market – the supply sector (people aged 45+) and the demand sector (employers) – were researched by means of quantitative methods – standardised interviews. The other stakeholders – entities which can influence the situation of the people aged 45+ on the Polish labour market i.e. institutions of the labour market, OUSWs, non-governmental organizations and – in the second stage – employers, were researched by means of the qualitative method (cf. drawing 2).

Drawing 2. Research modules of *Diagnosis of the current situation of women and men aged 50+ on the labour market in Poland*



* We considered using FGI (focus group interviews) instead of individual in-depth interview (IDI). FGI would allow for confrontation between opinions of different stakeholders (employers, employers' associations, representatives of staff) and through group effects would provide better results content-wise and interpretation-wise. On the other hand, in case of small economic entities, FGI could hinder the execution of the research because of the high percentage of refusals to participate in this kind of research by the representatives of small and medium-sized enterprises and could result in biased results caused by the over interpretation of big entities (because of the fact that the bigger entities were the subject of the research within the framework of the project entitled "Benefiting from age – trainings for entrepreneurs", in the *Diagnosis* we focused on the opinions of SME).

Source: own elaboration.

Works within the framework of the *Diagnosis* have been organized in the modular form. For the needs of each module, the concept of the research, research instruments and sampling rules were prepared, the pilot testing and the actual study were conducted and followed by the interpretation and analysis of the results.

1.5. Objectives of the research according to given modules

Module 1. The quantitative research of people aged 45+

The objective of the research was to analyse the occupational situation of women and men aged 45-69 and its determinants.

Detailed objectives:

1. Creating a profile of a person aged 45+ from the perspective of her/his role and significance in the labour market in the context of demographic and social determinants;
2. Evaluating the professional situation of people aged 45+;
3. Comparing the professional situation and non-professional situation of people aged 45+ according to the age groups;
4. Identifying the opportunities and barriers with regard to maintaining the employment of people at the pre-retirement age;
5. Evaluating attitudes of women and men at the pre-retirement age with regard to their professional and social work.

Module 2. and 3. The quantitative and qualitative research of employers

The general aim of the research is to analyse the current state and attitudes of employers with regard to the employment of people aged 45+ (employment continued by own employees and the newly employed, taking into consideration employment on the basis of employment contracts and civil-law contracts).

Detailed objectives:

1. Analysis of the scale of employment of people aged 45+ and their location in the structure of an organisation;
2. Analysis of the applied forms of employment of people aged 45+;
3. Analysis of the movement of employees, taking into consideration people aged 45+;
4. Analysis of the working conditions and possibilities of their modification in the group of people aged 45+;
5. Evaluation of the interest of employers in the aspect of human resources management, taking into consideration the older age of the employees;
6. The attitude of employers towards trainings financed/ co-financed by employers; the participation of employees aged 45+ in such trainings;
7. Identification of instruments stimulating people aged 45+ to be more economically active;
8. Evaluation of the existing legislative solutions from the perspective of the provision of equal opportunities for people aged 45+;
9. Evaluation of the suggestions of employers regarding the instruments favouring the provision of equal opportunities for people aged 45+.

The quantitative research allowed to analyse the employment of people aged 45+ in Polish organizations and to learn about the opinions of employers concerning this age group. The obtained results were supplemented by qualitative research which particularly aimed to provide information on the employers' perception of people aged 45+, practical age management (strategies, methods) existing in the researched organizations, as well as employers' evaluation of current and desirable operations favouring higher activity of people aged 45+, particularly helping to maintain their employment. Research of both modules complemented each other.

Module 4. The qualitative research of district labour offices

The research aimed to identify and evaluate the operations economically activating people aged 45+ programmed and carried out by district labour offices. The research also aimed to analyse the needs and problems of people aged 45+ in selected districts.

Detailed objectives:

1. Evaluating situation of people aged 45+ in the labour market in a given region/district;
2. Identifying operations economically activating those people, planned in strategies and programmes of the labour market;
3. Identifying operations carried out by DLO aimed at the economic activation of people aged 50+;
4. Identifying entities cooperating with DLO on projects carried out for the benefit of people aged 50+;
5. Identifying instruments stimulating people aged 45+ to be more active economically;
6. Evaluating existing legislative solutions from the perspective of the provision of equal opportunities for people aged 45+;
7. Evaluating propositions regarding instruments favouring the provision of equal opportunities for people aged 45+ in the labour market;
8. Evaluating cooperation of DLO with other stakeholders in the area of operations connected with economic activation of people aged 45+, particularly with OUSW.

Module 5. The qualitative research of employment agencies

The researched aimed to identify operations of employment agencies in the area of economic activation of people aged 45+, particularly unemployed people at the age 45+ who are searching for employment as well as those in whom are interested head hunters.

Detailed objectives:

1. Characteristics of employment agencies related to the employment of people aged 45+.
2. Description of the portfolios of clients who belong to the 45+ age category;
3. Identification of the entities cooperating with employment agencies on the economic activation of people aged 45+;
4. Evaluation of the cooperation between employment agencies and employers, district labour offices, OUSWs, organization of the 3rd sector and other stakeholders;
5. Identification of instruments stimulating people aged 45+ to be more economically active;
6. Evaluating existing legislative solutions from the perspective of the provision of equal opportunities for people aged 45+;
7. Evaluating propositions regarding instruments favouring the provision of equal opportunities for people aged 45+ in the labour market.

Module 6. The qualitative research of training institutions

The research aimed to define the area and the availability of training offers as well as to evaluate the offers provided by training institutions which support the economic activation of people aged 45+: the unemployed, those who are searching for employment and those wanting to broaden their own occupational competences or acquire new competences.

Detailed objectives:

1. Characteristics of training institutions offering trainings for people aged 45+;
2. Identification of operations carried out by training institutions aimed at the economic activation of people aged 45+;

3. Analysis of the scope and the subject of the trainings offered and carried out by training institutions which are aimed at the economic activation of people at this age;
4. Characteristics of lecturers conducting trainings for people aged 45+;
5. Characteristics of methods used to evaluate the quality of conducted trainings;
6. Identification of assistance in finding employment provided to a participant of such training after its termination;
7. Identification of entities cooperating with training institutions in the area of operations aimed at the economic activation of people aged 45+;
8. Identification of instruments stimulating people aged 45+ to be more economically active;
9. Evaluating existing legislative solutions from the perspective of the provision of equal opportunities for people aged 45+;
10. Evaluating propositions regarding instruments favouring the provision of equal opportunities for people aged 45+ in the labour market.

Module 7. The qualitative research of the social welfare units

The research aimed to identify the form and the scope of the social aid and support offered to people aged 45+ in the area of the economic activation, as well as to analyse the occupational situation of women and men aged 45-69 and its determinants.

Detailed objectives:

1. Characteristics of beneficiaries of social welfare aged 45+;
2. Identification of services of social welfare offered to beneficiaries aged 45+ related to their support in the labour market;
3. Analysis of their presence and their performance in the strategies solving social problems of a commune in the area of the economic activation of beneficiaries aged 45+;
4. Analysis of the execution of the programmes in the area of the economic activation of beneficiaries aged 45+;
5. Identification of operations of the social welfare institutions in the area of social economy and the participation of people aged 45+ in these initiatives;
6. Evaluation of the interest of the 45+ age group in the offers provided by the organizational units of social welfare, particularly propositions in the area of economic activation;
7. Identification of cooperation between the organizational units of social welfare and non-governmental organizations in the area of the economic activation of beneficiaries aged 45+;
8. Identification of the attitude of the managers and social welfare workers towards the operations of the economic activation aimed at people aged 45+;
9. Analysis of the legal, organizational and fiscal barriers regarding the operations of the economic activation aimed at people aged 45+;
10. Identification of instruments stimulating people aged 45+ to be more active economically;
11. Evaluating existing legislative solutions from the perspective of the provision of equal opportunities for people aged 45+;
12. Evaluating propositions regarding instruments favouring the provision of equal opportunities for people aged 45+ in the labour market.

Module 8. The qualitative research of non-governmental organizations

The research aimed to evaluate the situation (including needs and problems) of people aged 45+ (including 50+) in the local environment and from the perspective of the representatives of the 3rd sector. The evaluation of the operations undertaken by the non-governmental organization and local entities aimed at beneficiaries aged 45+ also constituted an essential element.

Detailed objectives:

1. Characteristics of non-governmental organization supporting the economic activation of people aged 45+;
2. Identification of operations carried out by non-governmental organizations aimed at the economic activation of people aged 45+;
3. Characteristics of problems and needs of people aged 45+ interested in the occupational and non-economic activity;
4. Identification of entities cooperating with non-governmental organizations on projects carried out for the benefit of people aged 45+;
5. Analysis of the legal, organizational and fiscal barriers regarding the operations of the economic activation aimed at people aged 45+;
6. Identification of instruments stimulating people aged 45+ to be more active professionally;
7. Analysis of legal factors significant for the provision of equal opportunities for people aged 45+.

Module 9. Experts' panel discussion

The aim of the Experts' panel discussion was to draft recommendations for the labour market policy and the social policy in the area of the provision of equal opportunities for people aged 45+ on the Polish labour market.

1.6. The territorial scope of the research in the *Diagnosis*

The field research of the *Diagnosis* is nationwide. The quantitative research (modules 1-2) was conducted on nationwide representative samples. In case of the qualitative research (modules 3-8), six Voivodeships were selected: Lubuskie Voivodeship, Małopolskie Voivodeship, Mazowieckie Voivodeship, Podkarpackie Voivodeship, Świętokrzyskie Voivodeship and Zachodniopomorskie Voivodeship. On the basis of earlier analyses⁷, these Voivodeships could be recognized as the typological representation (from the perspective of operations aimed to increase the economic activity of people aged 45+) of all the Voivodeships in Poland.

⁷ More on this subject in point 4.3.

2. Defining the type of the labour market

In case of all the research modules (both CAPI and CATI quantitative research as well as the qualitative individual in-depth interviews (IDI) and non-standardised interviews), the factor „the type of the labour market“ was taken into consideration, which differentiates between districts on the basis of the determinants of the local markets in relation to people aged 45+. Such approach was adopted because of the assumption that the perception of people aged 45+ and their situation in the labour market are connected with the general “local tendencies” regarding the employment of people at this age. The evaluation of the situation of people aged 45+ was performed synthetically on the basis of four partial indexes:

- the participation of people aged 45-69 in the general number of inhabitants of the district (in %);
- the total unemployment rate in the district (in %);
- the participation of people aged 45+ in the general number of the unemployed (in %);
- the degree of the district urbanization (the percentage of people living in cities against the total number of inhabitants of the district – in %).

In order to divide areas on the basis of the above-mentioned criteria, the classification of the districts was performed using the cluster analysis. The calculations were performed on the basis of data from the Local Data Bank (LDB) of GUS (Central Statistical Office) for the year of 2010.

The analyses were performed in two stages:

1. performing the classification of all 379 districts in Poland for the needs of the analysis of the quantitative research results – UŁ team;
2. performing the classification of districts for each of six Voivodeships which were included in the qualitative research in order to specify the sampling rules – the research company.

The classifications of districts on both stages were conducted in different ways. Nevertheless, the layout of the districts in groups is analogical, yet not identical. On both stages, although the same set of partial indexes and the same source data were used, a different method of cluster selection was applied. Additionally, both studies included a different set of entities (the first stage researched differences between districts in Poland; the second stage analysed a different set of districts for each Voivodeship). However, taking into consideration guidelines of both stages of works, it does not cause any problems. The classification carried out in the first stage allowed to ascribe each district to a specific group – a type of the labour market: A, B or C whereas the analysis conducted in the second stage allowed to group districts within each of the six Voivodeships (which was its aim). In order to guarantee a better clarity of the final report when quoting respondents participating in the qualitative research, the classification used in the quantitative research was applied – answers of a respondent looked like this (an example): [enterprise, Zachodniopomorskie Voivodeship, the labour market of C type]. It will allow the reader to compare the evaluations of people aged 45+, employers and institutions involved in the economic activation of this age group residing/conducting business activity on the territory with specific “local tendencies” towards the employment of people aged 45+.

The classification of 379 districts according to the type of the labour market, meaning the determination of the type of the labour market for all the districts in Poland, was conducted by means of the programme *ClustanGraphics 8* and in R programming language. From the wide range of different sets of methods for evaluating the clustering results on the basis of the number of selected classes, the methods used usually for agglomerative clustering were

applied. They were based on the analysis of the linkage distances between subsequent objects on the tree chart (*best cut significance test*) – the method of moving average and the examination of the lack of class structure – the method evaluating the randomness of the objects division on the tree chart (*tree validation*). The chosen solution was applied because of the better effectiveness of the above-mentioned methods in comparison to other commonly known criteria of selection of the number of clusters e.g.: Baker and Hubert, Caliński and Harabasz, Davis and Bouldin as well as Hubert and Levine⁸.

Taking into consideration the three agglomerative methods, two measures of distance and two methods for the evaluation of the clustering results adopted in the analysis, 12 variants of district grouping were obtained. The silhouette coefficient was used for the evaluation of the clustering results. It examines the dissimilarity i.e. the distance of every analysed i – object from the cluster to which it belongs, taking as a point of reference the minimal distance between the examined i object and all the objects in every other created r cluster ($i \neq r$). For each cluster q ($q = 1, \dots, u$) one calculates the cumulated value $s(i)$ of silhouette coefficients which give the value $S(q)$, and then one determines the general value of index $SI(u)$ for all the analysed u clusters.

The final selection of the clustering results (number of clusters) takes place on the basis of the criterion $\hat{u} = \arg \max_u [SI(u)]$. The conducted analysis showed that the best, from the perspective of the quality of the clustering result, are two groupings of districts, respectively of 4 and 3 homogeneous clusters (variant 8 and 10) for which the values of the silhouette coefficient were in the range $SI \in \langle 0.51; 0.70 \rangle$, which was indicative of reasonable structures of these classifications. The additional analysis of the compliance of these two district clustering results using the adjusted Rand index showed that the two discussed district divisions for 3 or 4 clusters are similar to each other in 77%. Taking into consideration the criterion of maximizing the value of the silhouette coefficient, the solution offering 3 clusters of similar districts was chosen as the final result. It was obtained by means of the method of average linkage with squared Euclidean distance on the basis of the criterion of randomness of the object division on the tree chart ($SI = 0.698$). The most important information of the cluster analysis was presented in table 1.

⁸ Detailed information concerning the methodology used in the classification of districts can be found in: A. Mikulec, *A proposition for the classification of districts according to the determinants of the local labour market in relation to people aged 45+ using the cluster analysis*, Łódź 2012, unpublished materials drafted within the project "Equal opportunities in the labour market for people aged 50+".

Table 1. Results of the cluster analysis of 379 districts according to 4 diagnostic variables together with the evaluation of the clustering results (number of clusters, the quality of clustering)

VA-RIANT	Agglomerative method	Measure of distance	Method for the evaluation of the clustering results	Number of clusters (the evaluation of the clustering results)	Silhouette coefficient SI (quality of clustering)
1	Complete linkage	Euclidean distance	moving average	6	0.303
2	Complete linkage	Euclidean distance	Randomness of the object division	2	0.431
3	Average linkage	Euclidean distance	moving average	5	0.371
4	Average linkage	Euclidean distance	Randomness of the object division	3	0.511
5	Ward's criterion	Euclidean distance	moving average	18	0.241
6	Ward's criterion	Euclidean distance	Randomness of the object division	4	0.409
7	Complete linkage	squared Euclidean distance	moving average	19	0.342
8	Complete linkage	squared Euclidean distance	Randomness of the object division	4	0.613
9	Average linkage	squared Euclidean distance	moving average	13	0.385
10	Average linkage	squared Euclidean distance	Randomness of the object division	3	0.698
11	Ward's criterion	squared Euclidean distance	moving average	39	0.394
12	Ward's criterion	squared Euclidean distance	Randomness of the object division	4	0.549

Source: A. Mikulec, *A proposition for the classification of districts according to the determinants of the local labour market in relation to people aged 45+ using the cluster analysis*, internal materials of the project "Equal opportunities in the labour market for people aged 50+", Łódź 2012.

From the operational perspective, the procedure of grouping according to the type of the labour market used in the quantitative research (in relation to people aged 45+) took place in the following order:

1. On the basis of the data from the Local Data Bank, concerning all the districts in Poland, and according to the four above-mentioned indexes, the grouping of districts was performed according to "the determinants of the local labour market regarding people aged 45+", distinguishing between districts of A, B and C type. In other words,

separate clusters were determined from the perspective of the features of local labour markets in the context of people aged 45+;

2. The number of the group (cluster) was ascribed to all the respondents of CAPI and CATI research. It means that the classification of the districts was transferred to the source base i.e. results of the CAPI research of people aged 45+ (and analogically – CATI of employers). Thanks to that, all the researched people aged 45+ and employers were ascribed to separate clusters, classifying them as representatives of the districts of the A, B or C type.

Tab. 2 synthetically presents the obtained clusters (groups of districts), defining them from the perspective of the four indexes that were taken into consideration.

Table 2. Characteristics of districts according to the type of the local labour market

Cluster no.	The type of the local labour market	Number of districts	Level of partial variables*			
			participation of people aged 45-69	total unemployment rate	participation of the 45+ unemployed in the general number of the unemployed	the urbanization degree
1	type A	166	low (do 28.9%)	rather high (15.5% - 21.5%)	low (do 24.4%)	low (do 23.3%)
2	type B	141	rather high (31.0% - 32.9%)	very high (21.6% lub więcej)	rather high (29.7% - 34.8%)	rather high (50.9% - 99.9%)
3	type C	72	very high (33.0% lub więcej)	low (do 9.3%)	very high (34.9% lub więcej)	very high (100%)

* The borderlines indicating low, medium, rather high or high levels of variables were determined on the basis of two statistics – the arithmetic mean (\bar{x}) and the standard deviation (STD) (adopted borderlines: (1) up to $(\bar{x} - STD)$, (2) $(\bar{x} - STL; \bar{x})$, (3) $(\bar{x}; \bar{x} + STL)$, (4) more than $(\bar{x} + STD)$).

Source: own materials.

Districts of **A type** have a low percentage of people aged 45+ among the unemployed and a low percentage of these people in the general number of inhabitants as well as a relatively low degree of urbanization. This type of the market has also a high unemployment rate. Representatives of the A districts (residing or conducting business activity on the labour market of A type) come from small towns or rural areas. The demographic and economic situation of this labour market can favour the employment of older employees because of the smaller competitiveness from the side of the younger and highly qualified people who in order to search for a job migrate to bigger cities as well as from the side of other people aged 45+, particularly regarding posts requiring professional experience and high competences.

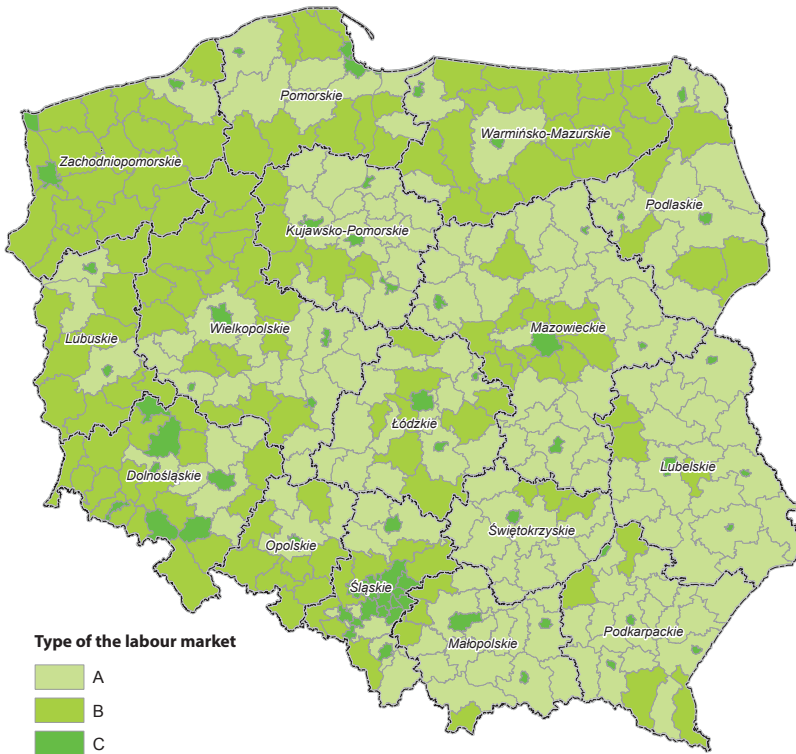
Districts of **B type** have a rather high percentage of people aged 45+ in their population and in the general number of the unemployed. Moreover, people aged 45+ and entities representing this type of the labour market operate in the conditions of a moderately high unemployment rate and a rather high degree of urbanization. The demographic and economic situation present in this market regarding people aged 45+ in comparison to the labour market of A type is much more professionally demanding, particularly when we take into consideration the high percentage of these people in the number of the unemployed.

The last cluster, called the labour market of **C type** consists of districts where the unem-

ployment rate is on the relatively low level, however, the percentage of people aged 45+ in the general number of the unemployed is high. Also the percentage of people aged 45+ in the total number of inhabitants is high. Districts belonging to this type of the labour market have a high degree of urbanization – these are mainly the biggest Polish cities. It results from the fact that people aged 45+ have a relatively difficult occupational situation in the labour market of C type. Such difficult situation is caused to a great extent by a strong competitiveness in the labour market⁹.

The location of the individual districts in Poland is presented in drawing 3.

Drawing 3. The spatial layout of the district types on the basis of the characteristics of the local labour market regarding older people



Source: own elaboration.

As mentioned, in the case of quoting the respondents participating in the qualitative research (module 3-8), a given respondent was ascribed (according to the location of the institution/enterprise represented by him) to a specific type of the labour market – A, B or C. It allowed to standardise the research approach in this area and simultaneously, it increased the cohesion of the final report. Detailed rules of unit selection (including administrative units) to the qualitative research will be discussed in the further part of the *Methodological Annexe* (cf. point 4.3).

⁹ Prepared on the basis of: R. Piwowarski *Characteristics of sampling and procedures guaranteeing the compliance of the sampling structure with the guidelines of the methodological report* (on the basis of the results of the employers quantitative research in *Diagnosis of the current situation of women and men aged 50+ on the labour market in Poland*), Łódź 2012.

3. Quantitative research methodology in the *Diagnosis*

3.1. Quantitative research – a theoretical aspect

Depending on the tradition of the research centre, the quantitative research is in sociology called differently and we can encounter the following names: survey research, polling research, questionnaire research. "The meaning of these terms is determined on the basis of the following features: (1) they are always carried out on the representative sample (random, quota or random –quota sampling); (2) questionnaires are used in highly standardised versions; (3) gathered materials (answers given by respondents and written by them or by interviewer) are processed in a qualitative manner. These materials constitute an empirical basis used to draw conclusions and to formulate statements with a higher degree of generality whose reliability depends on the value of primary data gathered"¹⁰. There exist several kinds of approaches in which this research is used:

- "Public opinion research aims to capture the state of awareness and to record opinions of the members of society on current affairs, often controversial events. It helps to keep trace of changes in attitudes of different communities and social groups. Special attention should be drawn to questionnaire research carried out prior to and after elections since it is the rare type of research in which it is possible to verify its predicting accuracy;
- Market research concentrates on learning about preferences, tastes, possession of various goods and the scope of use of different services by groups which vary in terms of sex, age, income, affluence and place of residence. It also examines the effectiveness of advertisement campaigns in order to be able to design better and more accurate promotional campaigns and to predict consumers' behaviour;
- Behaviour research in various domains of social life (e.g. victimology research, research on preventive medicine). Its main objective is the factual description and not recognition of the awareness state of the researched;
- Academic research, according to the guidelines, aims to provide empirical material for the verification of hypotheses and consequently for the formulation of theoretical statements of a higher degree of generality. The researched phenomena include e.g. values and life aspirations, common visions of social structure, perception of social distances and inequality as well as social mobility, changes in the social structure, relatively long-lasting ideological, religious, political and economic attitudes, states of mentality, participation in culture and many others"¹¹.

The uniformity of the quantitative research is its very important feature, meaning its standardization according to the adopted model. Research instruments as well as the manner of conducting and processing the research results are subject to standardization¹². The following are made uniform:

- Searched information concerning individual units of the research;
- Questions given to respondents, presented in a form of questionnaire identical for each study;
- The manner of recording the answers of respondents;

¹⁰ A. Kubiak, *Destrukcyjny proces akulturacji badań sondażowych w Polsce*, Przegląd Socjologiczny volume LVI/1 2007, p. 61.

¹¹ A. Kubiak, I. Przybyłowska, W. A. Rostocki, *Badania ankietowe*, [in:] *Encyklopedia Socjologii*, volume I, Oficyna Naukowa, Warszawa 1998, p. 54.

¹² J. Lutyński, *Metody badań społecznych. Wybrane zagadnienia*, Wydawnictwo ŁTN, Łódź 1994, p. 110-131.

- Behaviour, the way of conducting the interview by the interviewer e.g. repeating questions during the interview, explaining words or issues;
- Other behaviour of the interviewer such as the way of establishing the relationship, arranging research situation;
- The situation of the interview – the place of conducting the interview¹³.

The second essential feature of the quantitative approach is the fact that such research is not exhaustive but carried out on samples¹⁴. In case of majority of this type of research, the community is too numerous to research every person who belongs to it, since the research would be too expensive and too long. That is why we do not reach every person belonging to a given community but only some of them. All the people selected for the research constitute a sample. A set of conditions has to be met for the sample to be representative – the aim is to obtain an appropriate diversification of selected respondents.

Within the quantitative approach, we use various research techniques, mainly standardised interviews and different types of surveys.

The standardised interview is an interaction between the interviewer and the respondent – the interviewer poses questions, identical for everyone, included in the research instrument and records the answers. It requires earlier preparation of the questionnaire, meaning a set of questions concerning one or several topics. Questions can vary in terms of their form. The basic division of questions in the questionnaire is the division into close-ended questions, with prepared variants of answers for respondents and open-ended questions, when the respondent has to formulate his/her answer freely. As a result, we can obtain information how often a given feature, attitude or opinion occur in a given community. This interaction, an exchange of information between the interviewer and the respondent does not occur in isolation, but it is anchored in some social context – “in a specific social, economic and political situation of a given country – at a specific historical moment”¹⁵.

The traditional standardised interview requires a direct face-to-face contact between the interviewer and the respondent, whereas the survey, called an independent instrument, is based on the indirect communication, since the respondent fills it out himself/herself. The most common survey techniques include:

- “mail survey (the questionnaire is sent and returned by post);
- the questionnaire is published in a newspaper and returned by post;
- questionnaire attached to purchased consumption goods and returned by post;
- the researcher or other person distributes on the researcher’s behalf questionnaires and collects completed questionnaires;
- phone, radio and TV questionnaire (the text is conveyed by media and answers are sent by post);
- auditorium questionnaire is based on the fact that people gathered in one room fill out the questionnaire under the supervision of the researcher;
- generally available questionnaire (the questionnaire is available at the theatre, museum, exhibition and it is returned in a specific place usually into an urn)”¹⁶;
- an e-mail survey and CAWI (Computer assisted web interview).

New technologies modified also the manner of conducting the standardised interview. Currently apart from the traditional interviews – PAPI (*paper and pencil interview* – when the

¹³ P. B. Sztabiński, *Aranżacja wywiadu*, [in:] P. B. Sztabiński, Z. Sawiński, F. Sztabiński (ed.), *Fieldwork jest sztuką*, Wydawnictwo IFiS PAN, Warszawa 2005, p. 129-156.

¹⁴ Z. Sawicki, *Metody doboru respondentów*, [in:] P. B. Sztabiński, Z. Sawiński, F. Sztabiński (ed.), *Fieldwork jest sztuką*, Wydawnictwo IFiS PAN, Warszawa 2005, p. 81-82.

¹⁵ A. Kubiak, I. Przybyłowska, W. A. Rostocki, *Spółeczna przestrzeń wywiadu w procesie zmiany ustrojowej*, [in:] A. Sułek (ed.), *Dziedzictwo Stefana Nowaka*, Uniwersytet Warszawski, Instytut Socjologii, PTS, Warszawa 1992, p. 131.

¹⁶ A. Kubiak, I. Przybyłowska, W.A. Rostocki, *Badania ankietowe*, [in:] *Encyklopedia Socjologii*, volume I, Oficyna Naukowa, Warszawa 1998, p. 53.

interviewer talks directly with the respondent and records his/her answers on a paper questionnaire), we often use computer assisted interviews – CAPI (*computer assisted personal interview*) and phone interviews CATI (*computer assisted telephone interview*). “CAPI research is similar to that carried out by means of a classic standardised interview. Its basic feature is the fact that the interviewer reads out the questions from the laptop screen and records the respondent’s answers on the computer. After conducting a given number of interviews, the interviewer sends via internet all the data to the data centre of the research facility”¹⁷. Whereas CATI research is always carried out in a room equipped with proper phone and computer installations. “During CATI research, the interviewers contact the respondents by phone. Answers of the respondents are introduced into the computer system directly by the interviewers. Very characteristic for the current CATI research is the fact that it uses very technologically advanced sampling both on the level of the selection of phone numbers as well as of speakers”¹⁸. The methodology of this research allows for the reduction of costs and the use of very diligent supervision procedures.

For the sake of reliability of various kinds of quantitative research, obviously apart from the methodological correctness, it is significant how the research is perceived by the respondents, what is their knowledge of their role as people answering questions and what are their attitudes towards the research and confidence in the research, and to what degree conducting such research is anchored in the social awareness as reliable and binding manner of information gathering, in other words, what is the level of the acculturation of such study. Since the 90s of the twentieth century, such studies are conducted in Poland on a mass scale, that is why we can assume that their anchorage in the social awareness is significant¹⁹.

As mentioned earlier, within the *Diagnosis* the quantitative research was carried out with regard to two groups of respondents – people aged 45+ and employers.

3.2. Quantitative research methodology of people aged 45+

3.2.1. Research instruments and the pilot testing

The method applied in case of researching people aged 45+ (module 1) was the computer assisted personal interview (CAPI). The CAPI method is appropriate both on the level of the style of communication and contact preferred by the respondents – people aged 45+, as well as the long time of the interview (about one hour). Additionally, during the meeting, the respondent filled out one of the psychological tests (SWLS – *Satisfaction With Life Scale*).

The CAPI²⁰ interview questionnaire consisted of the respondent’s particulars and 5 sections of questions, both factual questions as well as questions enabling to show opinions and attitudes of respondents. The sections concerned: characteristics of the respondent’s household, his/her occupational and non-occupational situation, social activity as well as his/her opinions, views and attitude towards changes. There were also modules common to all entities concerning the opinions on operations in the labour market for the benefit of people aged+ as well as legal and formal regulations related to the employment policy of people aged 45+, as well as propositions of desirable directions and areas of supporting economic activity of older employees. Majority of questions were close-ended, however, opinions on

¹⁷ W. Jabłoński, *Rynek sondaży przedwyborczych w Polsce*, Przegląd Socjologiczny, volume LVI 2007, p. 115.

¹⁸ Ibid. p. 114.

¹⁹ A. Kubiak, *Destrukcyjna proces akulturacji badań sondażowych w Polsce*, Przegląd Socjologiczny, volume LVI/1 2007, p. 63-67.

²⁰ Although during the research an electronic version of the questionnaire was used, in the *Annexe* you will find only its paper version.

the issues important to the research were revealed through open-ended questions (these questions were pre-categorized for the interviewer).

Because of the criteria that eliminated the possibility to answer some questions by the respondents who did not meet the defined requirements, the duration time of the interview ranged between 32 and 122 minutes (on average the interview took about 52 minutes).

Before starting the stage of actual research, the instrument was verified by experienced interviewers in a pilot testing. The study was carried out in Mazowieckie Voivodeship, conducting 31 interviews with people from every selected group. Upon the analysis of the pilot testing results and the report on the pilot testing, some changes were introduced into the instrument and some comments added in the instructions for the interviewers.

Before the study, a letter with all the information required by Interviewer Quality Control Scheme (IQCS) was prepared. The letter was given to all the respondents of CAPI research (both in the pilot testing and the actual study). In this way, the basic requirements the ESOMAR code were fulfilled. The code says that the participation in the research has to be voluntary and conscious. The respondent was informed in detail about the nature of the undertaking.

3.2.2. Sampling for CAPI research regarding people aged 45+

3.2.2.1. General guidelines for sampling

Sampling provided the representativeness of the results for all the inhabitants of Poland aged 45-69.

Based on the data from PESEL register, the population of people aged 45-69 amounted in 2011 to 11 880 119 people with a slight predominance of women (52.4%) (cf. tab. 3).

Table 3. Population of people aged 45-69 by sex and age

Age	Sex	Number of			Percentage of (N=11880119)		
		men	women	total	men	women	total
45-49		1 248 337	1 266 844	2 515 181	10.5%	10.7%	21.2%
50-54		1 463 054	1 535 509	2 998 563	12.3%	12.9%	25.2%
55-59		1 342 046	1 478 857	2 820 903	11.3%	12.4%	23.7%
60-64		990 006	1 155 725	2 145 731	8.3%	9.7%	18.1%
65-69		610 850	788 891	1 399 741	5.1%	6.6%	11.8%
Total		5 654 293	6 225 826	11 880 119	47.6%	52.4%	100.0%

Source: *The methodological report "Carrying out a nationwide study aiming at drafting the Diagnosis of the current situation of women and men aged 50+ on the labour market in Poland", consortium IBC GROUP Central Europe Holding S.A. & ARC Rynek i Opinia Sp. z o. o.*

According to the guidelines of the research, the sample had 3200 entities, taking into consideration the following groups selected on the basis of the age criterion:

1. people who have not turned 50, the age which constitutes a dividing line determined in the objectives of the project Equal opportunities in the labour market for people aged 50+ (people aged of 45-49);
2. people aged 50+ who have not reached the statutory retirement age (apart from the entitlements of some occupational groups to earlier retirements) i.e. 59 years for women and 64 for men (people aged 50-59/64);
3. People who have reached the statutory retirement age (people aged 60/65 -69).

The age was an additional criterion of stratification.

Random sampling of research subjects was performed in each stratum. Within the Diagnosis of possible variants of sampling, the proportional allocation was rejected since it could result in very uneven number of subsamples, causing diversified accuracy of population estimations for each stratum. With the obtained allocation (disproportional), subpopulations (strata) were represented by samples with 229 to 428 respondents, which means that fractions in each of the corresponding subpopulation were estimated with a sufficient accuracy (the error of estimation did not exceed 5%). In case of the estimation of parameters for the whole population of people aged 45-69, it was necessary to use analytical balances. The increase in the estimator variance was caused by the use of balances exceeding 1.00. Nevertheless, it was insignificant since the biggest balance did not exceed the level of 1.30.

The assumed as well as the final numbers of subjects within strata are presented in table 4.

Table 4. The structure of the sample for the research of people aged 45-69 by sex and age

Age \ Sex	Planned sample			Actual sample		
	men	women	total	men	women	total
45-49	400	400	800	353	330	683
50-54	300	300	600	289	285	574
55-59	300	300	600	324	303	627
60-64	300	250	550	350	309	659
65-69	400	250	650	229	428	657
Total	1 700	1 500	3 200	1 545	1 655	3 200

Source: *The methodological report "Carrying out a nationwide study aiming at drafting the Diagnosis of the current situation of women and men aged 50+ on the labour market in Poland", consortium IBC GROUP Central Europe Holding S.A. & ARC Rynek i Opinia Sp. z o. o.*

The sampling scheme included also the structure control based on the geographical diversification i.e. the province (16 Voivodeships) and 4 classes of locality size: village, small town (up to 50 thousand of inhabitants), medium town (50-200 thousand of inhabitants) and big city (more than 200 thousand of inhabitants). The control was achieved thanks to the allocation of the whole sample proportionally between the territorial strata defined by Voivodeships and classes of locality size. The total division of the population aged 45-69 between Voivodeships and above-mentioned classes of locality size is presented in table 5.

Table 5. The division of the population of people aged 45-69 by Voivodeships and classes of locality size

Voivodeship	Class of locality size based on the number of inhabitants				Total
	village	town up to 50 k	town from 50 to 200 k	city above 200 k	
Dolnośląskie	252 602	308 155	181 840	205 569	948 166
Kujawsko-pomorskie	232 291	130 624	165 316	119 534	647 765
Lubelskie	322 760	143 740	80 092	111 661	658 253
Lubuskie	106 882	132 854	80 180	0	319 916
Łódzkie	268 450	192 410	114 235	261 738	836 833
Małopolskie	372 813	286 388	62 691	235 026	956 918
Mazowieckie	510 919	346 329	118 573	611 357	1 587 178
Opolskie	144 554	116 521	62 435	0	323 510
Podkarpackie	316 957	177 867	116 123	0	610 947
Podlaskie	131 240	92 098	40 719	88 257	352 314
Pomorskie	189 830	206 808	51 543	229 611	677 792
Śląskie	285 657	255 630	189 378	798 469	1 529 134
Świętokrzyskie	204 490	85 606	114 670	0	404 766
Warmińsko-mazurskie	161 953	164 149	113 094	0	439 196
Wielkopolskie	410 078	293 302	155 283	176 244	1 034 907
Zachodniopomorskie	156 312	201 084	61 052	134 076	552 524
Total	4 067 788	3 133 565	1 707 224	2 971 542	1 188 019

Source: P. Mielczarek, *The preliminary report on CAPI quantitative research carried out among people at the age 45+ within the nationwide research – Polish labour market for women and men aged 50+ - Diagnosis, consortium IBC GROUP Central Europe Holding S.A. & ARC Rynek i Opinia Sp. z o. o.*

For the adopted geographical strata, we adopted a proportional sampling allocation. The assumed numbers within separate groups of localities were applied – cf. tab. 6.

Table 6. Distribution of the sample in the study of people aged 45-69 by province and classes

Voivodeship	Classes of locality size according to the number of inhabitants				Total
	village	town up to 50 k	town from 50 to 200 k	city above 200 k	
Dolnośląskie	60	80	40	60	240
Kujawsko-pomorskie	60	40	40	40	180
Lubelskie	80	40	20	20	160
Lubuskie	20	40	20	0	80
Łódzkie	80	60	20	60	220
Małopolskie	100	80	20	60	260
Mazowieckie	140	100	40	160	440
Opolskie	40	40	20	0	100
Podkarpackie	80	40	40	0	160
Podlaskie	40	20	20	20	100
Pomorskie	60	60	20	60	200
Śląskie	80	60	60	220	420
Świętokrzyskie	60	20	40	0	120
Warmińsko-mazurskie	40	40	20	0	100
Wielkopolskie	100	80	40	40	260
Zachodniopomorskie	40	60	20	40	160
Total	1 080	860	480	780	3 200

Source: P. Mielczarek, *The preliminary report on CAPI quantitative research carried out among people at the age 45+ within the nationwide research – Polish labour market for women and men aged 50+ - Diagnosis*, consortium IBC GROUP Central Europe Holding S.A. & ARC Rynek i Opinia Sp. z o. o.

The size of samples was bigger since the response rate depends on the class of locality size where the respondent lives. It was assumed that the response rates were identical in each Voivodeship (there are no data which would prove otherwise). However, we took into consideration the response rate for 4 classes of locality size, which are the product of experience of top Polish research centres (cf. table 7).

Table 7. Response rate for various classes of locality size (in %)

	Classes of locality size according to the number of inhabitants			
	village	town up to 50 k	town from 50 to 200 k	city above 200 k
<i>response-rate</i>	60%	50%	40%	30%

Source: P. Mielczarek, *The preliminary report on CAPI quantitative research carried out among people at the age 45+ within the nationwide research – Polish labour market for women and men aged 50+ - Diagnosis, consortium IBC GROUP Central Europe Holding S.A. & ARC Rynek i Opinia Sp. z o. o.*

3.2.2.2. Procedures of sampling

The sample was selected in clusters whose sizes were assumed to be identical for each of the size classes of the selected respondent's place of residence. It was also assumed that the size of the cluster has to be divided by two, so it was possible to divide randomly selected parts in two during realization and to select them successively for realization afterwards, which helps to control the response rate. The sizes of the selected sample for separate size classes of residence places and Voivodeships were determined in a way enabling to take into consideration three types of assumptions at the same time:

1. assumed sizes of the interviews in each subsample defined by age and sex;
2. assumed total number of interviews in each cell of total division defined by the Voivodeship and the class of locality size;
3. assumed response rates in 4 classes of locality size of the selected respondents.

The sample was selected in two stages:

1. in the first stage, we selected points of realization of the research according to the assumed territorial allocation of the sample;
2. in the second stage, we selected respondents on the basis of points of realizations selected in the first stage of the research.

The complete PESEL data base constituted the sampling frame for the selection of addresses of individual respondents from the selected points of realization.

The data expiration in this data base does not exceed 3-4% of the addresses and it is caused mainly by migrating and evading the obligation to register one's place of residence.

The PESEL register, storing personal data of the whole population of Poland, to mark the locality uses, apart from the official name of the locality, codes corresponding to the elementary administrative area of the state – the commune. Each commune has its own unique 7-digit territorial code, whereas town-village communes have two codes: one for the town, and one for the rural part of the commune. Each code unequivocally defines the type of the selected area (urban or rural).

The PESEL data allow to characterize the division of the population from the perspective of age, sex and place of residence (commune) based on the registration data – at the moment of sampling as of 1 April 2011. Before selecting the points of realization of the research, the sample was verified by means of the updated data of GUS (*Size and structure of population and vital statistics by territorial division in 2012. As of 31 December 2010* http://www.stat.gov.pl/gus/5840_655_ENG_HTML.htm).

The sampling procedure included the following stages:

1. Determining the sample size for classes of locality size

- In each cell of the total Voivodeship-class of locality size division, an initial number of clusters with 20 addresses each was determined. The number was proportional to the number of people residing in the area so the total number of clusters amounted to 160, which corresponds to the table of territorial allocation divided by 20;
- Assuming the response rates for separate strata presented in tab. 7, such a number of clusters for the class was determined, so it would be possible to realize the number of interviews planned for each class;
- Reserve clusters were added to the sizes determined in the previous stage, lowering, for this purpose, the hypothetical response rate by 5 to 11 percentage points, which gave us in total 480 clusters to select;
- The sizes of classes determined in the previous stage were allocated between Voivodeships proportionally to the number of people aged 45-69 residing in that area. This stage finishes the territorial allocation of the sample to select.

2. Selecting the points of realization of the research

As a result of territorial allocation of the sample, we obtained a list of territorial strata containing two sizes determined for each of them: the size of cluster and the number of clusters, meaning the number of elementary administrative areas which had to be selected.

The selection of elementary administrative areas was conducted independently for each stratum. The areas were selected by means of the simple random sampling with replacement, with probabilities proportional to the number of members of the population 45-69 residing in them. As a result, the areas with a large number of residents (e.g. big cities not divided into quarters) were selected more than once.

Because of the relatively large number of the realization points of the research (over 200), the adopted procedure guaranteed that the sample territorial allocation was, to a great degree, compliant with the division of the number of residents within the strata defined by the state regions and the classes of locality size. The sample territorial allocation was performed by the Contractor who also performed the field research of the *Diagnosis* – consortium member ARC Rynek i Opinia responsible for the qualitative research.

3. The territorial allocation of sex and age of selected people

The number of 20-element clusters in the selected sample was three times bigger than in the realized planned sample and amounted to 480 instead of 160. Thanks to the fact that the division of sex and age was practically independent of the class of locality size and Voivodeship, the number of subsample (1-6), so the age category and sex, was randomly ascribed to each of the 10-element halves of 480 clusters, meaning to the list containing 10 addresses located in one point of realization of the research and referring to people with identical configuration of sex and age group.

4. Sampling of addresses in elementary administrative areas

Sampling frame – the PESEL register – initially was limited to the population assumed in the research. The records in so reduced frame were organized randomly.

The selection of addresses from the selected area took place in two stages:

- The starting point of the research in a given area was randomly selected (the first address of the resident of a selected area);
- Addresses of other people were selected in the manner consistent with the leap proportional to the number of residents in a given locality identified by the starting address;

The identical procedure was independently applied in all elementary administrative areas. The selection of the starting address in the rural commune was preceded by a random selection of villages from the territory of the commune and verification whether a number of people aged 45-69 living in that area was sufficient to select people. The selection of addresses was performed by Ministry of Interior.

3.2.2.3. System of sample weighing, precision of parameters estimation

In order to maintain the representativeness of the results on the scale of the whole country and individual age and sex groups, the results were subject to suitable weighing. The analytical balances balanced deviations from the division of the population and the assumed structure of the sample which are the effect of the diversification of refusal scale within the area of individual groups.

The design factor of a person aged 45-69 selected from a given stratum is equal to the sampling fraction reciprocal of the choice of this person in that stratum. The design factors were corrected because of the refusals to participate in the research and the use of all the reserve samples. In order to estimate the completeness rate of answers, the sample was divided based on the age and sex groups. It was assumed that the probability of answer completeness of every class is stable. Corrected design factors were calculated for separate age and sex groups through dividing their design factors by appropriate answer completeness rates for separate strata. It has to be underlined that the increase in the estimator variance caused by the use of weights exceeding 1,00 was insignificant. Analytical balances were presented in tab. 8.

Table 8. Values of analytical balances for individual strata

Age	Men	Women
45-49	0.97	1.02
50-54	1.43	1.38
55-59	1.23	1.19
60-64	0.89	0.86
65-69	0.93	0.38

Source: P. Mielczarek, *The preliminary report on CAPI quantitative research carried out among people at the age 45+ within the nationwide research – Polish labour market for women and men aged 50+ - Diagnosis*, consortium IBC GROUP Central Europe Holding S.A. & ARC Rynek i Opinia Sp. z o. o.

The estimation on the basis of adopted sample size and adopted allocation within strata has defined estimation errors on individual levels. The size of the estimation error is calculated on the basis of the adopted formula: $1/\sqrt{n}$ which is used with the assumed random sampling and the size of population which approaches infinity. In case of estimations concerning the whole population of people aged 45-69, the estimation error amounts to 1,77%. The level of estimation precision allows for generalizations also for the whole population of women and men, as well as within each age subgroup regarding both populations selected on the basis of sex, since the average estimation error for each group never exceeds 5% - cf. tab. 9.

Table 9. Estimation errors for individual strata (in %)

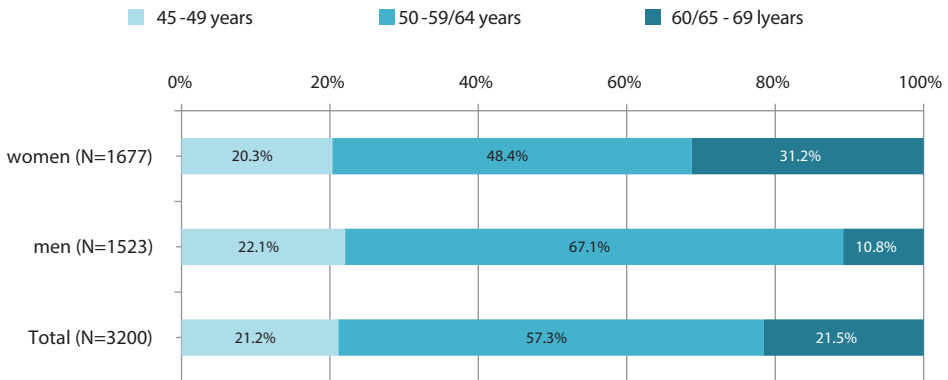
Stratum	Age	Average error of estimation		
		women	men	total
1	45-49	5.00	5.00	3.54
2	50-59/64	4.08	3.33	2.63
3	60/65-69	4.47	5.00	3.24
Total		2.58	2.43	1.77

Source: P. Mielczarek, *The preliminary report on CAPI quantitative research carried out among people at the age 45+ within the nationwide research – Polish labour market for women and men aged 50+ - Diagnosis, consortium IBC GROUP Central Europe Holding S.A. & ARC Rynek i Opinia Sp. z o. o. and own calculations.*

3.2.3. Structure of sampling in CAPI research regarding people aged 45-69

Among 3200 researched people aged 45-69 (in weighted sample i.e. after taking into consideration analytical balances), women accounted for 52.4%. Analysing weighted sample from the perspective of age, people aged 45-69 constituted 21.2%, aged 50-59 – 57.3% and people aged 60/65-69 – 21.5% – cf. chart 1. Naturally, proportions of people from the second and the third group are different in case of women and men, which is caused by a different borderline of the retirement age (60 years for women and 65 years for men).

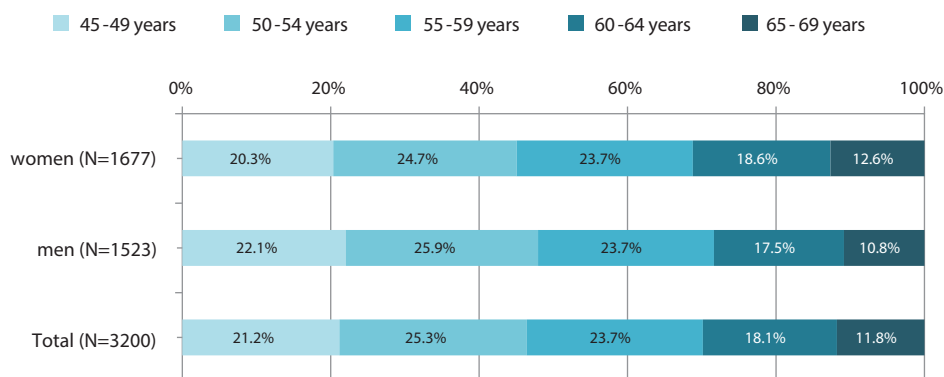
Chart 1. Structure of people aged 45-69 by sex and age (in %)



Source: own elaboration.

Taking into consideration five-year age groups, the structure of the sample is much less diversified – it concerns both women as well as men (cf. chart 2).

Chart 2. Structure of the sample of people aged 45+ by sex and 5-year age groups (in %)



Source: own elaboration.

Overweight structure of people aged 45-69 according to the Voivodeship of residence was presented in tab. 10. As you can see, the highest percentage was recorded in case of demographically "old" Voivodeships – Śląskie Voivodeship, Mazowieckie Voivodeship and Łódzkie Voivodeship.

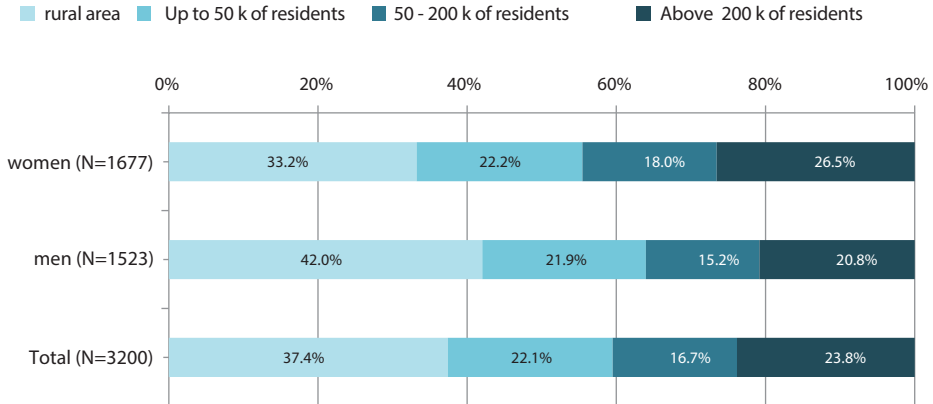
Table 10. Structure of the sample by sex and Voivodeship (in %)

Voivodeship	Total (N=3200)	Women (N=1677)	Men (N=1523)
Dolnośląskie	7.2	6.9	7.6
Kujawsko-pomorskie	5.8	6.1	5.5
Lubelskie	4.7	4.2	5.3
Lubuskie	2.6	3.0	2.1
Łódzkie	11.4	11.8	10.8
Małopolskie	6.7	7.1	6.3
Mazowieckie	15.1	13.7	16.5
Opolskie	3.9	4.8	3.0
Podkarpackie	6.5	5.7	7.5
Podlaskie	3.6	3.5	3.6
Pomorskie	2.3	2.2	2.4
Śląskie	13.5	14.0	13.0
Świętokrzyskie	4.6	5.1	4.0
Warmińsko-mazurskie	2.6	2.3	3.0
Wielkopolskie	5.1	4.4	6.0
Zachodniopomorskie	4.3	5.3	3.3
Total	100.0	100.0	100.0

Source: own elaboration.

Around 37% of respondents are the residents of rural areas – such participation is very similar to the structure of population –rural areas (according to the registration data) are inhabited by around 36% of the population aged 45-69. Every fourth respondent is a resident of big city, and nearly every fourth – of a small town (cf. chart 3).

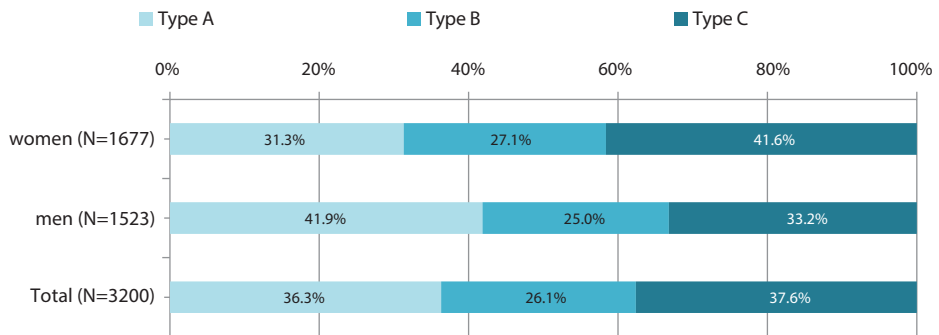
Chart 3. Structure of the sample of people aged 45+ by sex and class of locality size (in %)



Source: own elaboration.

The division of the sample according to the type of the district (local labour market) is relatively even for the type A and C (around 37%), whereas the residents of the B type districts constituted around 26% of the community (cf. chart 4).

Chart 4. Structure of the sample by sex and the type of the local labour market (in %)



Source: own elaboration.

3.3. Methodology of employer quantitative research

3.3.1. Research instruments and the pilot testing

In case of the qualitative research of employers (module 2) the mode of the computer assisted telephone interview was applied (CATI). The CATI methodology is appropriate both on the level of the style of communication and contact preferred by people occupying specific posts (respondents of the research) as well as on the level of the objective of each interview which can be fulfilled thanks to the contact based on time intervals and with various people who can have partial knowledge of a given area. The telephone interview is, in this situation, the most efficient and the most optimal from the economic perspective since it allows for numerous "returns" to the same respondent or the same institution without incurring disproportionately high costs.

The CATI²¹ interview questionnaire consisted of the respondent's particulars and 5 sections of questions, both factual questions as well as questions enabling to show opinions and attitudes of respondents.

The sections concerned: employment status, HR policy, organization and time of work, movement of the employed. There were also modules common to all entities concerning the opinions on operations in the labour market for the benefit of people aged+ as well as legal and formal regulations related to the employment policy of people aged 45+, as well as propositions of desirable directions and areas of supporting economic activity of older employees. Majority of questions were close-ended, however, opinions on the issues important to the research were revealed through open-ended questions (these questions were pre-categorized for the interviewer).

Because of the criteria that eliminated the possibility to answer some questions by the respondents who did not meet the defined requirements, the duration time of the interview ranged between 17 and 122 minutes (on average the interview took about 70 minutes).

Before starting the stage of actual research, the instrument was verified by experienced interviewers in a pilot testing. The study was carried out in Mazowieckie Voivodeship, conducting 33 interviews with employers from every selected stratum. Upon the Diagnosis of the pilot testing results and the report on the pilot testing, some changes were introduced into the instrument and some comments added in the instructions for the interviewers.

Before the study, a letter with all the information required by Interviewer Quality Control Scheme (IQCS) was prepared. During the research, the respondent was informed about the possibility to send the letter via e-mail, which took place at the request of the research participant. In this way, the basic requirements the ESOMAR code were fulfilled. The code says that the participation in the research has to be voluntary and conscious. The respondent was informed in detail about the nature of the undertaking.

3.3.2. Sampling for employer CATI research

3.3.2.1. General guidelines for sampling

Sampling provided representativeness of the results for all the employers whose registered office is located in Poland and who employ at least one employee. In accordance with the guidelines of the *Diagnosis*, employers were divided based on the proprietorship form (the variable "sector") into categories:

²¹ Similarly to the case of CAPI questionnaire, in the *Annexe* we present only the paper version of the research instrument, although in the research respondents filled out electronic questionnaire.

- 1) public entities;
- 2) non-public entities (including non-profit).

The research was carried out among employers, controlling the scale of the employment in order to obtain a full image of the situation among all the categories of the entities in this area. Based on the scale of the employment (the variable "scale") the following categorization was adopted:

- 1) entities employing 1-9 employees (micro);
- 2) entities employing 10-49 employees (small);
- 3) entities employing 50-249 employees (medium);
- 4) entities employing over 250 employees (large).

According to the REGON data as of 2011²², 3 866 779 entities operated in Poland; 97% constituted non-public entities. The division of population by the sector of the business activity and the scale of employment is presented in tab.11.

Table 11. Population of economic entities registered in the REGON base by the sector of business activity and the scale of employment

List	Public	Non-public	Total	Public	Non-public	Total
	number			%		
0-9	69 809	360 1867	3 671 676	1.8%	93.1%	95.0%
10-49	39 083	121 828	160 911	1.0%	3.2%	4.2%
50-249	10 909	18 511	29 420	0.3%	0.5%	0.8%
250+	1 732	3 040	4 772	0.0%	0.1%	0.1%
Total	121 533	3 745 246	3 866 779	3.1%	96.9%	100.0%

Source: "Carrying out a nationwide study aiming at drafting the Diagnosis of the current situation of women and men aged 50+ on the labour market in Poland", consortium IBC GROUP Central Europe Holding S.A. & ARC Rynek i Opinia Sp. z o. o.

According to the guidelines of the research, the sample was supposed to consist of 1000 entities but the total number of conducted interviews was 1011 interviews. The concept of the research assumed that at the stage of the analyses comparisons between individual strata would be performed. Strata were supposed to be selected on the basis of the sector (public/non-public) and the scale of the employment (micro, small, medium, large). The size of the individual strata was adopted according to the following allocation which assumes an optimal representativeness on the level of strata, and simultaneously it is profiled in accordance with the proportions of the population.

²² Structural changes in the groups of entities of the national economy entered in the REGON register, 1st half of 2011, GUS, Warszawa 2011.

Table 12. The division of the sample in the research of employers by the sector of business activity and the scale of employment

List	Planned division of the sample			Actual division of the sample		
	public	non-public	total	public	non-public	total
0-9	100	175	275	99	178	277
10-49	100	175	275	111	173	284
50-249	100	150	250	104	146	250
250+	100	100	200	104	96	200
Total	400	600	1000	418	593	1011

Source: "Carrying out a nationwide study aiming at drafting the Diagnosis of the current situation of women and men aged 50+ on the labour market in Poland", consortium IBC GROUP Central Europe Holding S.A. & ARC Rynek i Opinia Sp. z o. o.

The suggested allocation of the sample required the determination of the analytical balances necessary for the estimation of the parameters of the whole population of employers.

3.3.2.2. Procedures of sampling

For each stratum, separate subsamples were selected. The entities were selected without replacement with identical probabilities.

The frame for employers sampling was the base of HBI Polska containing data concerning around 184 thousand of economic entities. HBI Polska Sp. z o. o. with the registered office in Płock is the operator of the base. The sampling frame contains all the required categories of employers – both from the public sector as well as from non-public sector with an additional note for those belonging to NGO. In total the base contains around 6 thousand public entities and around 1 thousand of NGOs²³. HBI was complemented by records containing data from the sector of NGO transferred by UŁ²⁴. Because of the fact that initially the quality of the frame was unknown, as well as the response rate of separate strata connected with it, before starting the realization of the research, the sizes of reserve samples were not determined. The reserve samples were selected in an identical manner as the basic sample.

3.3.2.3. System of sample weighing, precision of parameters estimation

Because of the adopted disproportional allocation, it was necessary to apply analytical balances. Sample weighing increased the estimator variance of the parameters of the whole population since the analytical balance was too high for the category where there are 95% of all the entities registered in REGON (non-public, employing 0-9 employees).

After the realization of the research, analytical balances were also used with regard to the diversification of the refusal percentage in separate strata. The analytical balances adopt values from 0 up to above 5. The values of individual balances for each analytical stratum are presented in tab. 13.

²³ The methodological report "Carrying out a nationwide study aiming at drafting the diagnosis of the current situation of women and men aged 50+ on the Polish labour market", consortium IBC GROUP Central Europe Holding S.A. & ARC Rynek i Opinia Sp. z o. o.

²⁴ M. Sobczak, *Third sector and its operations in the area of economic activation of people aged 50+ (45+)*, Łódź 2010.

Table 13. Values of the analytical balances adopted by separate strata

Size/sector	Public	Non-public
0-9	0.184364808461	5.290655388292
10-49	0.092059098591	0.184120784121
50-249	0.027425427548	0.033149640985
250+	0.004354279999	0.008279500846

Source: P. Mielczarek, *The preliminary report on CATI quantitative research carried out among employers within the nationwide research – Polish labour market for women and men aged 50+ - Diagnosis, consortium IBC GROUP Central Europe Holding S.A. & ARC Rynek i Opinia Sp. z o. o.*

Estimations on the basis of the adopted size of the sample and the adopted allocation within strata have defined estimation errors on individual levels. In case of estimations concerning the whole population, taking into consideration answers of all the respondents (1011), the estimation error amounts to 3.1% – cf. tab. 14.

Table 14. Estimation errors for individual strata (in %)

The scale of employment	Average error of estimation		
	public sector	non-public sector	total
0-9	10.1%	7.5%	6.0%
10-49	9.5%	7.6%	5.9%
50-249	9.8%	8.3%	6.3%
250+	9.8%	10.2%	7.1%
Total	4.9%	4.1%	3.1%

Source: P. Mielczarek, *The preliminary report on CATI quantitative research carried out among employers within the nationwide research – Polish labour market for women and men aged 50+ - Diagnosis, consortium IBC GROUP Central Europe Holding S.A. & ARC Rynek i Opinia Sp. z o. o.* and own calculations.

Generalizations in the area of subpopulations selected by both factors simultaneously are not recommended because of the relatively high estimation error, exceeding even 10%. Generalizations on the level of individual sectors have accepted error range (less than 5%). In case of generalizations done on the basis of the scale of employment, it is recommended to be more cautious, even though the maximal error is 7%, which, taking into consideration the survey nature of the research, entitles to conduct analyses also in this scope.

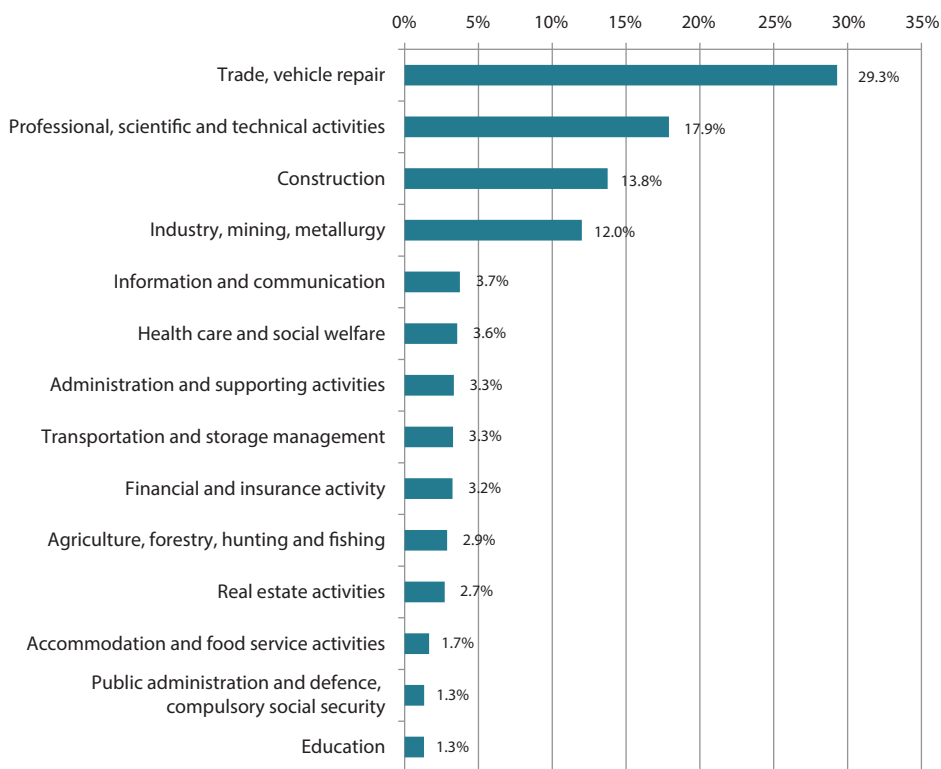
3.3.3. Structure of sampling in CAPI research regarding employers

Within the sample, there were entities representing various sectors of business activity. After overweighting the sample, the largest share belonged to the entities representing trade and vehicle repair (29.3%), professional, scientific and technical activities (17.9%), construction (13.8%) and industry, mining and metallurgy (12.0%) (cf. chart 5). It has to be emphasized that this structure should not be compared to the employment structure of PKD (Polish classification of activities). According to BAEL, the participation of the employed in those

departments is different – among the employed aged 45+, the employed in manufacturing constituted in first quarter of 2012 around 17%, whereas people employed in trade and vehicle repair sectors – around 11%. However, the entities operating in the sector “trade, vehicle repair”, as well as “professional, scientific and technical activities” are usually micro and small entities, individually generating small number of jobs. The “sector-based” structure of number of working people does not correspond to the structure of employers. One cannot, on the basis of BAEL data, define the representativeness of the sample from the perspective of this criterion (we need to remind that in the research the compliance with the population on the basis of this factor was not controlled).

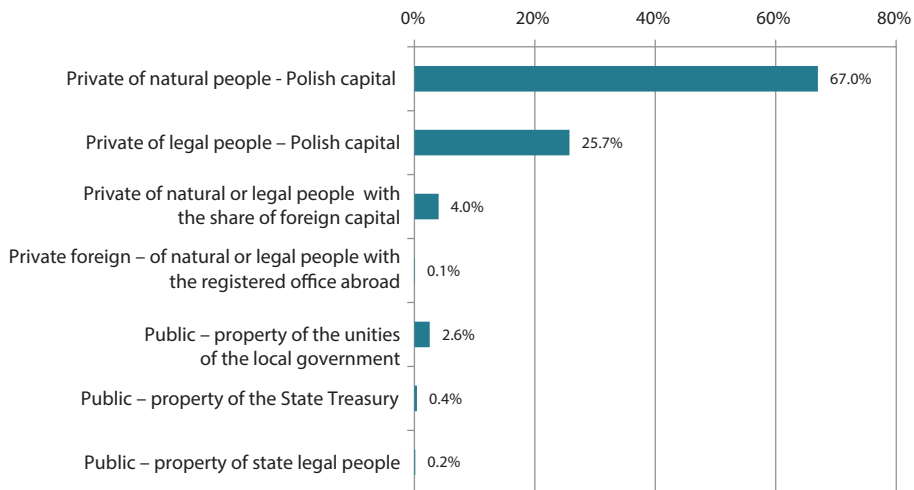
2/3 of the researched employers (after overweighing the sample) are enterprises – property of private people based exclusively on native capital, and ¼ are companies also with 100% of Polish capital (cf. chart 6).

Chart 5. Structure of the sample by the sector of business activity of the employer (in %; N=1011)



Source: P. Mielczarek, *The preliminary report on CATI quantitative research carried out among employers within the nationwide research – Polish labour market for women and men aged 50+ - Diagnosis, consortium IBC GROUP Central Europe Holding S.A. & ARC Rynek i Opinia Sp. z o. o.*

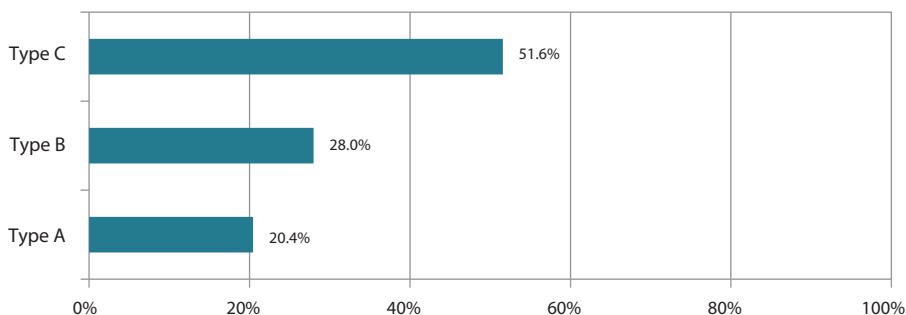
Chart 6. The proprietorship form of the researched employers (in %; N=1011)



Source: P. Mielczarek, *The preliminary report on CATI quantitative research carried out among employers within the nationwide research – Polish labour market for women and men aged 50+ - Diagnosis*, consortium IBC GROUP Central Europe Holding S.A. & ARC Rynek i Opinia Sp. z o. o.

From the perspective of the location of the entities, in the context of the local tendencies towards employment of people aged 45+ (the type of the labour market), in the sample – as one could expect – the predominant number of entities have their registered office on the territory of the C type districts – cf. chart 7. These are the districts with the highest urbanization degree and simultaneously, with the largest concentration of employers.

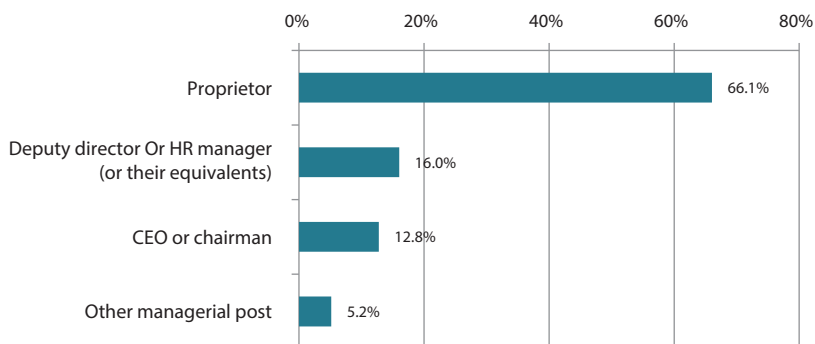
Chart 7. Structure of the sample by the type of the labour market (in %; N=1011)



Source: own elaboration created on the basis of the results of the employers' qualitative research in *Polish labour market for women and men aged 50+ - Diagnosis*, Łódź 2012.

An appropriate selection of the respondents was also very important for the realization of the objectives of the research. As shown in the chart 8, according to the guidelines, participants of the research were proprietors (around 66% of the sample) and people occupying managerial posts.

Chart 8. Division of respondents into represented by them units (in %; N=1011)



Source: P. Mielczarek, *The preliminary report on CATI quantitative research carried out among employers within the nationwide research – Polish labour market for women and men aged 50+ - Diagnosis*, consortium IBC GROUP Central Europe Holding S.A. & ARC Rynek i Opinia Sp. z o. o

3.4. Trainings and supervision of quantitative research

3.4.1. Trainings in quantitative research

The quantitative research was preceded by trainings which were conducted by the project manager or the person responsible for the quantitative part of the project, appropriately to the characteristics and methodology of the research. Training materials and the oral content contained all required by QCSC information: the context and objectives of the research, the information on size and structure of the sample, information on deadlines, comments and detailed instructions, description of questionnaire instruments. A representative of UŁ team participated in trainings.

In the case of CAPI research, all the regional coordinators were trained personally at the office of ARC Rynek i Opinia. Then, the coordinators personally trained all the interviewers in their facilities. The training of the coordinators at the office of the research company was recorded on the audio-video file and constituted a very important element of the trainings of interviewers.

In the case of CATI research, personal trainings were organized for all CATI interviewers – at the CATI studio of ARC Rynek i Opinia. The training took place in several stages for several groups of interviewers, each time for not more than 30 people.

3.4.2. Supervision procedures in quantitative research

Each quantitative research (both CAPI and CATI) was supervised according to the requirements of QCSC; the percentage of the controlled interviews was increased and amounted to, both for the field control and the logical control, not less than 10% of cases.

Logical supervision in the CAPI research consisted of:

- 1) substantive analysis of the completed questionnaires;
- 2) substantive analysis of the documentation of the interviewer's work;
- 3) logical supervision of data with special attention paid to the results different from the norm.

The logical supervision was conducted with the use of standard methods of data analysis, within which the internal cohesion of data and their completeness, in reference to 100 % of the gathered material, were verified. As a result of this verification, interviews in which the percentage of variables with lack of answers exceeded 10 % were not incorporated into the result set.

As a result of the logical analysis, 45 interviews were not incorporated into the final base because of the inconsistency of the respondents' answers (name and surname or date of birth were not correct).

In the case of CAPI research, the basic form of the **field supervision** was the phone verification conducted post factum according to the adopted scheme of conversation, during which the interviewer – controller checked: whether the interview took place (respondent was asked whether he/she participated in the research and what topics were discussed), whether it was conducted properly (was the interview conducted personally? did the interviewer have a laptop from which he/she read the questions and where he/she recorded the answers?), whether the interviewer performed his/her task well (did he/she have the ID badge? did he/she adjust the speed of reading to the respondent's needs, was he/she nice?). The field verification was conducted on 10% of the performed interviews i.e. 320 cases, and in total there were 619 phone calls made (the bigger number is connected to the fact that e.g. the phone number of the respondent was wrong, nobody answered the phone or the number was engaged, the answering machine was reached instead of the respondent, the respondent refused to take part in the conversation etc.).

Similarly to CAPI research, the **logical supervision** of CATI was conducted by means of standard methods of data analysis, within which the internal cohesion of data and their completeness were verified, and it was applied to 100 % of cases.

The **field supervision** consisted of listening to the interviews – in order to, among others, verify the correct classification of individual entities to right categories (public, non-public and with regard to the scale of employment) equal to strata within which the sample was selected. The selection of right respondents in companies meeting the recruitment conditions was carried out within the set of questions concerning the number of employees, the sector, the place of conducting the business and the post and competences of the respondent.

During the field supervision, a great attention was paid to the work of the interviewer, his/her application of the interviewing methodology and detailed instructions as well as guidelines and standards of the interviewer's job.

Within the field supervision, training and correcting steps were taken. Interviews conducted incorrectly or interviews when the respondent did not obey interviewer's requests were not incorporated into the base with results. Within this research, the representative of UŁ participated personally in the procedures of the field supervision, observing its effects and participating in the undertaken correcting operation when introducing changes into the research instrument.

It has to be added that the interviewers during interviews were supported by the special-ist programme CADAS. Functions of CADAS allow to monitor the process of the research realization, both on the level of the company's headquarters and on the level of separate regions. In the case of CATI research, the allocation of records to the research was performed automatically according to the scheme compliant with the requirements of the research: both in reference to the sample structure (the programme automatically controlled the realization of the sample in individual strata) as well as to the requirements regarding the maximising of the sample representativeness which was realized by, among others, several attempts to

reach given phone numbers. The CADAS software allowed for an efficient management of the interrupted or postponed conversations: in order to provide a continuation of the interview with a given respondent, the interview could be continued by a different interviewer available at a given moment. The CADAS software allowed for an automatic synchronization of data and simultaneously for the creation of the central data base.

3.4.3. Anonymity procedures in quantitative research

The following basic principles regarding people participating in the research were observed: the principle of voluntary participation, the principle of complete disclosure, the principle of personal data protection, the principle of confidentiality and anonymity. These principles are defined by the obligation of disclosure present in the ESOMAR code and in the act on personal data protection²⁵ on the basis of the obligations connected with the personal data protection.

The principle of voluntary participation means that the participation of the respondent in the research is voluntary. The interviewer can perform the interview only upon the respondent's consent to take part in the research. The interviewer while making contact with the potential respondent can use exclusively methods based on motivating and encouraging the potential respondent to participate in the research e.g. by pointing out the social benefits which can be obtained from the conclusions and analyses of the research or by pointing out that the research is a good opportunity to voice one's own opinion on a given subject which can constitute a great value in itself.

The principle of complete disclosure means that the respondent has to be informed about: the objective of the research, the entity ordering the research, the methodology of the research, the duration of the research, the source of the personal data and contact details.

Personal data protection means that every employee of the research company, particularly the interviewers are obliged to protect personal data of the respondents through the prohibition to reveal it to third people and through the obligation to protect the data carrier (the notebook) as well as through the prohibition to reveal the user name and the password to the notebook and the CADAS system. In the event of data breach e.g. because of the loss of the data carrier, the interviewer is obliged to inform immediately the police and the representative of the research company.

Anonymity means that data and opinions gathered in the course of the research will be present exclusively in the form of statistical juxtapositions and will not be, in any way, analysed or processed in the connection with the personal data of the respondents.

3.5. Methods of analysis for quantitative research results

The manner of sampling in the quantitative research allowed to perform estimations and create probabilistic models. The measurement of CATI and CAPI type allowed to obtain multi-factor statistical characteristics which enable to explore, describe and explain the problem in the data analysis using parameters and indexes.

Because of the nominal or organizational measurement level of the majority of variables, the statistical analysis was usually carried out by means of the chi-square independence test which allows to: (i) evaluate the connection between quality variables (particularly the nominal ones) but also to (ii) evaluate the relevance of the differences between populations, in the event when the researched phenomenon is of qualitative nature. For 2x2 tables, it is recommended to take into consideration the continuity correction. In the event when not all of the

²⁵ The act on personal data protection of 29 August 1997, Dz.U. 1997 No. 133 item 883 as amended.

sizes in the cross tabulation were expected to be bigger than 5, Fisher's exact test was used instead of the chi-square independence test

In the event when the researched phenomena were measured on the quantitative scale the following was applied:

- 1) when two populations were compared – Student's t-test or its non-parametric equivalent - Mann-Whitney test (when deviations from the normality of distribution occurred);
- 2) when more than two populations were compared – ANOVA (univariate analysis of variance) or mean value equality tests (Welch's test or Brown-Forsythe test), when the condition of homogeneity of the dependent variable variance is not fulfilled, or the Kruskal-Wallis test (non-parametric equivalent of ANOVA, used when deviations from the normality of division occur);
- 3) the correlation coefficient (Pearson's coefficient or Spearman's rank correlation coefficient - rho) in the analysis of connections between the qualitative variables.

Logistic regression was also applied. It allowed to estimate the probability of event occurrence (taking into consideration a specific set of independent variables – both quantitative and qualitative variables).

Regularities determined on the level of the sample were recognized as significant in the statistical sense if the test probability p (so called empirical significance level) did not exceed the level of significance $\alpha=0.05$. The significance of connection/difference was marked by the symbol *.

4. Methodology of qualitative research in the *Diagnosis*

4.1. Qualitative research – a theoretical aspect

The qualitative research aims at a closer analysis of the social world from the perspective of its participants and co-creators. A description, an interpretation and sometimes an explanation of social phenomena from the “internal” perspective can take place in various manners:

1. by analysing experiences of individuals and groups; these experiences can be connected both to individual biographies as well as private or occupational lives – one can reach them by analysing common knowledge and various types of relations and narratives;
2. by analysing interactions and acts of communication in the course of their duration; one can achieve that by analysing reconstructions, registrations and recordings of such acts;
3. by analysing documentation (texts, images, films) or similar traces of human experiences and interactions²⁶.

Common for all these approaches is the attempt to decipher how people create the world around them, what they do and what happens to them. Majority of quantitative research searches for regularities in the meanings that can be recreated and realized by means of various qualitative methods enabling the researcher to formulate – more or less generalized – models and typologies²⁷.

The qualitative research aims to find answers to such questions like *why?* and *in what way?* some phenomena and situations take place, in order to deepen the issue, find justifications, motives, ways of functioning and behaving of some people and institutions. Individuals as well as institutions are usually selected in a purposive way, meaning due to their particularly important and unique features, or because they are typical of wider social groups, phenomena, processes or events. “Usually in qualitative research undertakings, one works with a relatively limited number of cases. Generally, researchers using qualitative methods tend to limit their research scope for the sake of details²⁸.”

Similarly to the quantitative research, the qualitative research uses various techniques and research methods. Basis ones include different types of observations and different types of non-standardized interviews. Among techniques based on direct contact we can enumerate group and individual interviews.

In the group interview, several people answer to questions of the interviewer at the same time. The most often used interview of this type is FGI – *focus group interview*. There are various definitions of focus research but every definition accentuates that the focus method is a type of discussion – an exchange of opinions, a joint investigation of an issue. It is, however, a discussion controlled by a scenario containing, among others, a set of questions posed by the interviewer – a moderator – to all the participants of the meeting²⁹.

Appropriately selected participants are invited to participate in such a meeting taking place in a special room, where at a round or oval table (which is very significant to create partner-like relationship) they discuss the matter at hand. The discussion, conducted by a moderator, should focus on several issues which are the most important for a given study.

²⁶ U. Flick, *Jakość w badaniach jakościowych*, PWN, Warszawa 2011, p. 13.

²⁷ *Ibid.* p. 13.

²⁸ D. Silverman, *Prowadzenie badań jakościowych*, PWN, Warszawa 2008, p. 32.

²⁹ P. Daniłowicz, J. Lisek-Michalska, *Fokus – zogniskowany wywiad grupowy. Zarys metody*, [in:] J. Lisek-Michalska, P. Daniłowicz, *Zogniskowany wywiad grupowy. Studia nad metodą*, Wydawnictwo UŁ, Łódź 2007, p. 17-32.

When preparing such a meeting one should:

- Define the issue and formulate research questions;
- Define the researched population – figure out what kind of people would be the best respondents in this matter;
- Choose a moderator, a person conducting a given discussion who is able to control the researched group, control their behaviour, initiate and stimulate the discussion;
- Draft a scenario, meaning a list of questions – each scenario should describe in detail the course of the session and define the rules of group operation;
- Prepare the strategy of the research realization within which the number of participants in each group has to be determined;
- Determine the number of focus groups in a given research project;
- Determine the place of the session;
- Prepare the cost estimate of the research³⁰.

The field realization of the research consists of three stages:

- Recruitment of the participants;
- The session;
- Preparation of all the materials (recording tapes, recruitment questionnaire, texts or images being the subject of the discussion etc.)³¹.

Individual interviews can be classified according to the level of their structuralisation, which allows to divide them into:

- Less targeted non-standardised interview (non-structured) in which the researcher's questions, that he asks himself, have a form of open-ended questions and concern general issues; there is no list of ready questions for the respondent. Questions asked by the interviewer in a given interview should be individually adjusted to a given respondent. They should have a form of open-ended questions stimulating longer answers. The behaviour of the interviewer – the way he/she communicates, arranges the interview situation, the language he/she speaks, the polite forms of address he/she uses – should be individually adjusted to each of the respondents. It is important not to impose the way of perception represented by the researcher but to reconstruct the one of the respondent's;
- Targeted non-standardised interview (structured) concerns more detailed issues and the questions usually assume the closed-ended form. In this type of interview, the interviewer can ask more detailed questions and their contents as well as behaviour of the interviewer should be adjusted to the respondent³².

Individual in-depth interview (IDI) is a very popular type of non-standardised interview used especially often in case of marketing research. It is conversation of two people (the interviewer and the respondent) which "aims to gather information that is the subject of the research and to broaden the knowledge in a given area. (...) Such an interview has a relatively free structure, meaning that formulating specific questions and their chronology are less important than obtaining information"³³.

Conducting non-standardised interviews requires such skills like analytical listening, the ability to adjust to the respondent's answers and to refer to earlier issues in subsequent questions as well as the ability to communicate with the respondent and to build an atmosphere of an interview that would stimulate the respondent to give the interviewer exhaustive, broad answers, full of examples and justifications. For such an interview to be well-conducted, it is

³⁰ P. Daniłowicz, J. Lisek-Michalska, *Fokus – zogniskowany wywiad grupowy. Zarys metody*, [in:] J. Lisek-Michalska, P. Daniłowicz, *Zogniskowany wywiad grupowy. Studia nad metodą*, Wydawnictwo UŁ, Łódź 2007, p. 17-32.

³¹ *Ibid.*, p. 27.

³² I. Przybyłowska, *Wywiad swobodny ze standaryzowaną listą poszukiwanych informacji i możliwości jego zastosowanie w badaniach socjologicznych*, *Przegląd Socjologiczny*, volume XXX 1978, p. 63.

³³ D. Maison, *Jakościowe metody badań marketingowych*, PWN, Warszawa 2010, p. 62.

necessary to record it, so the interviewer can concentrate on listening to the answers of the respondent.

Non-standardised interviews can be used to study various spheres of social life. They are not only important for such branches like anthropology, sociology, ethnography or psychology, but they are also used in medicine for medical history taking, by law-enforcement bodies and judicial authorities, social welfare units and during employees' recruitment.

Non-standardised interview can play different roles in social studies – it could be:

- a main and only technique – it has such a status in research with methodological objectives or in researched aiming to describe functioning of single, separate institutions;
- a complementing technique – when in a given research project, several techniques of equal importance are used jointly e.g. interviews, observations and documentation analysis etc.;
- an auxiliary technique:
 - non-standardised interview can be helpful when preparing questionnaires for the quantitative research; thanks to them it is easier to determine the research situation, to conduct a preliminary evaluation and to prepare the list of questions for the questionnaire;
 - non-standardised interviews are carried out after the quantitative research in order to gather more detailed information and additional interpretations of psychological mechanisms and descriptions of unique cases.

In the qualitative research within *The Diagnosis of the current situation of women and men aged 50+ on the labour market in Poland* (modules 3-8), the following methods were used as techniques of material collection: individual in-depth interview (IDI) and less structured non-standardised interview. 50 interviews were performed in each module, meaning 250 IDIs and 50 non-standardised interviews were conducted in the qualitative research in total (which gives 300 qualitative interviews).

4.2. Research instruments and the pilot testing

Scenarios of the interviews (instructions for individual in-depth interviews (IDI) and non-standardised interviews) were prepared for the qualitative modules of the research in each of these institutions. In the instructions/scenarios there were common modules to all the institutions which concerned: characteristics of a given institution, cooperation with other entities dealing with the employment policy regarding people at this age, opinions on operations in the labour market for the benefit of people aged 45+, formal and legal regulations concerning the employment policy regarding people aged 45+ as well as propositions of desirable directions and areas of supporting economic activity of older employees. In the instructions/scenarios there were sets of searched information concerning the specificity of business activity of each of these entities e.g. (i) for employment agencies – what are the recruitment procedures for individual groups of employers?; (ii) training institutions – whether and what modifications were introduced into trainings if their participants belonged to the population of people aged 45+?; (iii) district labour offices – what operations were undertaken by offices regarding unemployed people aged 45+? what are the financing rules for such operations?; (vi) organizational units of social welfare – what is the scope and the forms of aid aimed at people aged 45+?; (v) non-governmental organizations – what is the percent-

age of people aged 45+ involved in voluntary services?; and among (vi) employers – what is the policy of employment with regard to people at this age? The final version of scenario for employers was prepared after taking into consideration results of the CATI quantitative research – consequently, some of the issues in instructions were extended e.g. cooperation with trade unions as well as criteria which are taken into consideration when employers entrust older employees with: various tasks, overtime work, more stressful tasks, explanations why older people are more often employed in public institutions and institutions/companies with a larger number of employees.

Each entity selected for the research realized within the framework of modules 3-8 was described by means of an identical template (so called survey form) which included information characterising and identifying a given subject of the research – address, number of employed people, infrastructure and equipment etc.

Before the study, a letter with all the information required by Interviewer Quality Control Scheme (IQCS) was prepared. The letter was given to all the respondents. In this way, the basic requirements the ESOMAR code were fulfilled. The code says that the participation in the research has to be voluntary and conscious. The respondent was informed in detail about the nature of the undertaking.

Before starting the stage of actual research, the instructions were verified by experienced interviewers in pilot studies. The study was carried out in the institutions of Łódzkie Voivodeship, conducting 4 interviews with each type of institution, giving in total 24 interviews. Upon the analysis of the pilot testing results and the report on the pilot testing, some changes were introduced into the instrument – the scenario of the interview, and some comments added in the instructions for the interviewers, which aimed to emphasize the problems with the recruitment of the respondents.

4.3. Rules of sampling in qualitative research

The qualitative research was carried out in 6 Voivodeships: Lubuskie Voivodeship, Małopolskie Voivodeship, Mazowieckie Voivodeship, Podkarpackie Voivodeship, Świętokrzyskie Voivodeship and Zachodniopomorskie Voivodeship. The selection of the Voivodeships was based on the following criteria:

1. quantitative criteria – the unemployment rate in total, the percentage of people aged 45+ (45-59/64) and 50+ (50-59/64) in the total number of the unemployed, the percentage of long-term unemployed people aged 50+ in the total number of the unemployed at this age;
2. qualitative criteria: the evaluation of the scope taking into consideration the situation of people aged 45+ in the strategic documentation and the scale of undertaken operations regarding the provision of equal opportunities in the Polish labour market for people aged 45+. We used also the results from the research carried out within the framework of Task 1 of this project whose subjects were the programmes aimed at people aged 50+ in Poland³⁴.

Voivodeships selected for the research can be classified into three groups:

Group 1. Mazowieckie, Małopolskie, Zachodniopomorskie;

Group 2. Świętokrzyskie, Lubuskie;

Group 3. Podkarpackie.

³⁴ Results of the analysis of regional programmes and strategies were used – cf. Przywojska J., A. Podgórnjak-Krzykacz, *The analysis of the labour market programmes favouring the professional activation of people aged 50+/45+*, Łódź December 2010; Przywojska J., A. Podgórnjak-Krzykacz, *The analysis of state and regional strategies from the perspective of the professional activation of people aged 50+/45+*, Łódź December 2010.

Voivodeships classified under group 1 could constitute a source of good practices within the area of programming and carrying out the labour market policy and social policy regarding people aged 45+.

Voivodeships from group 2 have a weaker situation in the labour market regarding people at the immobile working age, however, the main reason to classify them in group 2 is their insignificant involvement in the issues concerning people aged 45+ (including 50+) observed in the most important strategic documentation as well as delays – in comparison to other Voivodeships – in undertaking intensive operations favouring the provision of equal opportunities for people aged 45+(paying particular attention to the group of people aged 50+). It has to be underlined that in the second group there are no Voivodeships which completely lack actions supporting the economic activation of people at this age. Nevertheless, in comparison to other Voivodeships, their operations are much weaker.

In group 3 there is only one Voivodeship – Podkarpackie Voivodeship. In this Voivodeship, the situation of people at the immobile working age in the labour market, evaluated on the basis of the number of the unemployed aged 45+, 50+ as well as their percentage in the total number of the unemployed, is one of the best. Nevertheless, the structure of unemployment is very unfavourable – more than half of the unemployed 50+ remains unemployed for 12 or more months, which classifies this group as a group particularly threaten with long-term unemployment. Moreover, the tendencies of changes regarding the unemployment of this age group (particularly the long-term unemployment) are – in comparison to other Voivodeships – the least favourable. This Voivodeship undertakes distinct steps towards the provision of equal opportunities for people at the immobile age, which is very visible in the basic strategic documentation of the Voivodeship as well as in the Action Plan OP HC. It results in a great number of projects aimed at this age group carried out already between 2007-2009.

The next step of the selection of administrative units was the choice of 50 districts in which the qualitative research was carried out. As underlined in point 2 of the *Annexe*, the selection of districts was performed taking into consideration four partial indexes: the percentage of people aged 45-69 in the population of the district's residents, the general unemployment rate, the percentage of the unemployed 50+ in the total number of the unemployed, the degree of urbanization of the district.

The number of districts selected for the sample was proportional to the number of districts in the researched Voivodeships, meaning if the number of districts in a given Voivodeship constituted e.g. 25% of all the districts from 6 Voivodeships, the number of districts from this Voivodeship constituted also 25% of the total number of districts qualified for the research. It has to be pointed out that, according to the guidelines of the research concept, the following interviews should be carried out in the same districts: interviews in the district labour offices (module 4), in organizational units of social welfare (module 7) and in non-governmental organizations (module 8), whereas with regard to the research of employment agencies (module 5), training institutions (module 6) and employers (module 3) limitations concerning location of the entities were related only to the Voivodeship allocation, without the necessity to carry out the research in the same districts where operations within the frameworks of modules 4, 7 and 8 were performed. The number of districts selected for sampling in comparison to the number of districts in a given Voivodeship is shown in tab. 15.

Table 15. Number of districts selected for the sample

Voivodeship	Number of districts in the Voivodeship	Percentage of districts in the Voivodeship (in %)	Number of districts in the sample
Lubuskie	14	10	5
Małopolskie	22	16	8
Mazowieckie	42	31	15
Podkarpackie	25	18	9
Świętokrzyskie	14	10	5
Zachodniopomorskie	21	15	8
Total	138	100	50

Source: The methodological report "Carrying out a nationwide study aiming at drafting the Diagnosis of the current situation of women and men aged 50+ on the labour market in Poland", consortium IBC GROUP Central Europe Holding S.A. & ARC Rynek i Opinia Sp. z o. o., Warszawa 2012.

The selection of individual districts within each of the six Voivodeships took place on the basis of two-stage cluster analysis. The non-hierarchical method was applied. This method assumes transferring of one subject from one cluster into another one in order to find the best set of clusters according to the applied criterion (e.g. the smallest intergroup variance). The applied procedure based on the smallest distances of k-means allowed to recognize and profile basic and homogeneous segments in the area of six Voivodeships. Upon introducing four predictors, three segments were obtained for each Voivodeship (cf. tab. 16).

Table 16. Values of partial indexes and assignment to the district clusters in the six Voivodeships analysed in the qualitative research

District	Percentage of people aged 45 - 69 in the population of the district's residents (%)	The unemployment rate in total (%)	Percentage of the unemployed 50+ in the total number of the unemployed (%)	Degree of the district urbanization (%)	Group (cluster, segment)
Lubuskie Voivodeship					
gorzowski	30.23	11.7	35.85	36.09	3
międzyrzecki	32.19	21.7	30.60	53.12	2
słubicki	30.59	19.0	34.58	63.35	3
strzelecko-drezdenecki	31.64	23.2	32.74	47.33	2
sulęciński	30.44	14.7	32.90	40.93	3
m. Gorzów Wielkopolski	33.53	8.1	38.17	100.00	1
krośnieński	31.94	24.6	31.31	50.88	2
nowosolski	31.75	25.7	32.29	65.13	2

świebodziński	31.44	8.8	29.57	47.67	3
zielonogórski	30.95	13.9	30.90	37.51	3
żagański	31.94	27.9	30.68	60.75	2
żarski	31.69	17.4	31.98	61.18	2
wschowski	30.10	16.4	30.01	50.13	3
m. Zielona Góra	32.89	7.7	36.61	100.00	1
Małopolskie Voivodeship					
bocheński	27.69	8.8	19.03	31.74	1
krakowski	29.48	11.4	26.44	17.18	2
miechowski	31.32	9.7	19.04	23.00	1
myślenicki	26.69	12.8	22.93	25.52	1
proszowicki	30.06	11.9	17.08	14.17	1
wielicki	28.57	10.9	29.52	26.54	2
m. Kraków	31.01	4.7	35.96	100.00	3
gorlicki	28.63	13.8	21.84	33.41	1
limanowski	24.77	17.2	21.12	18.00	1
nowosądecki	24.94	17.6	21.08	17.87	1
nowotarski	26.74	12.4	24.94	28.26	1
tatrzański	29.26	10.0	29.96	40.75	2
m. Nowy Sącz	30.37	9.8	26.41	100.00	3
chrzanowski	33.05	13.9	27.99	62.59	2
olkuski	32.61	14.2	28.21	49.54	2
oświęcimski	31.48	12.4	28.19	54.10	2
suski	27.81	10.4	24.75	24.81	1
wadowicki	28.62	12.0	27.56	28.75	2
brzeski	27.43	11.9	21.27	20.90	1
dąbrowski	27.41	19.1	19.34	26.81	1
tarnowski	26.43	13.6	20.40	12.07	1
m. Tarnów	32.41	9.2	29.43	100.00	3
Mazowieckie Voivodeship					
ciechanowski	31.99	16.2	32.76	53.42	2
gostyniński	32.05	20.9	30.88	40.56	2
mławski	29.71	14.1	31.83	40.82	2
płocki	29.18	20.1	27.47	9.00	1
płoński	30.57	16.6	27.70	31.16	2
sierpecki	29.81	21.2	27.65	34.80	1

żuromiński	29.36	21.5	27.31	27.10	1
m. Płock	32.99	11.0	33.99	100.00	3
łosicki	30.39	11.0	22.74	22.47	2
makowski	29.87	21.5	28.09	26.97	1
ostrołęcki	26.25	17.7	21.47	3.48	1
ostrowski	29.56	17.1	27.94	32.85	1
przasnyski	29.17	15.1	25.25	37.49	1
pułtuski	29.13	19.7	25.24	37.45	1
siedlecki	27.52	11.1	20.36	2.28	1
sokołowski	31.16	10.1	24.79	37.08	2
węgrowski	29.37	15.2	28.76	28.69	1
wyszkowski	28.28	15.8	27.34	37.39	1
m. Ostrołęka	32.65	15.1	32.44	100.00	3
m. Siedlce	31.47	9.6	31.90	100.00	3
białobrzegi	27.82	14.7	28.33	24.23	1
kozienicki	31.72	17.8	29.60	29.28	2
lipski	32.01	15.6	25.67	15.93	2
przysuski	29.88	26.5	29.14	14.40	1
radomski	28.07	30.8	27.76	19.22	1
szydlowiecki	29.07	36.0	28.71	29.83	1
zwoleński	29.17	20.6	24.68	21.66	1
m. Radom	32.06	22.7	35.29	100.00	3
m. st. Warszawa	31.95	3.5	41.76	100.00	3
garwoliński	27.24	12.4	28.35	28.17	1
legionowski	30.73	11.2	37.76	53.54	3
miński	29.14	9.5	31.12	44.28	2
nowodworski	30.80	12.4	30.80	50.18	2
otwocki	30.45	8.4	38.28	62.01	3
wołomiński	27.87	13.1	35.19	67.57	2
grodziski	30.72	6.5	32.20	58.02	2
grójecki	30.95	7.8	32.54	34.18	2
piaseczyński	29.03	7.4	35.63	46.29	2
pruskowski	31.64	6.8	42.38	60.84	3
sochaczewski	30.75	10.1	31.35	44.69	2
warszawski zachodni	31.66	5.9	39.06	35.42	3
żyrardowski	31.39	13.7	30.56	62.76	2

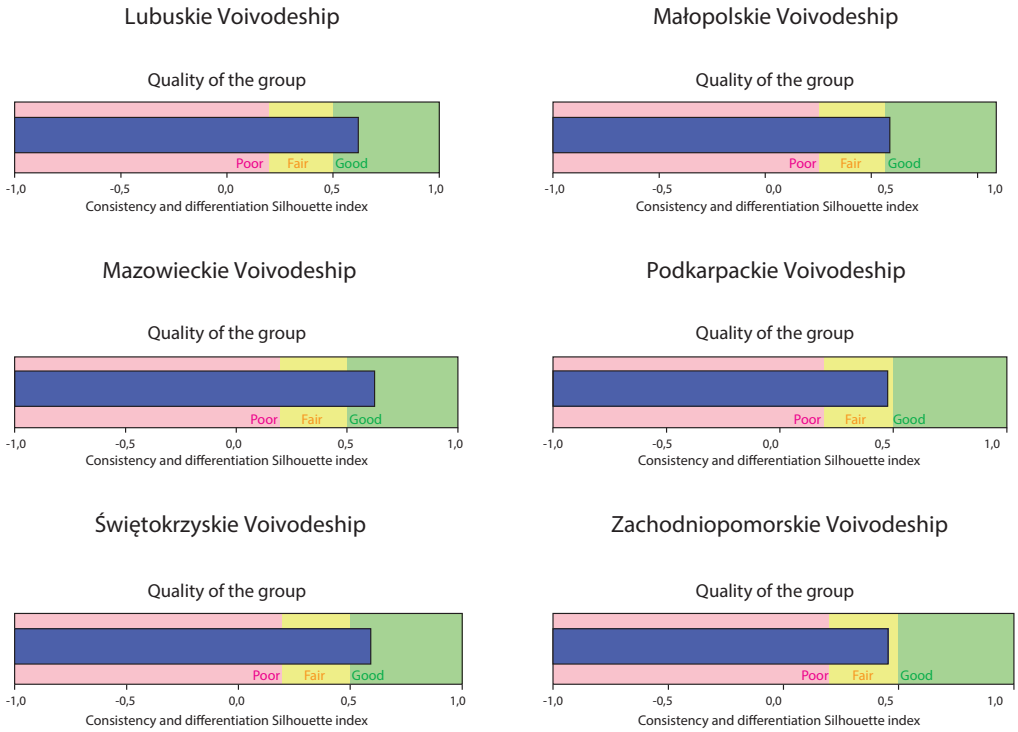
Podkarpackie Voivodeship					
bieszczadzki	30.25	22.2	26.21	42.51	1
brzozowski	27.34	22.5	26.13	11.61	1
jasielski	29.19	17.2	24.47	33.49	3
krośnieński	28.53	17.5	22.39	11.75	3
sanocki	30.80	13.2	26.49	46.48	2
leski	29.63	21.8	29.04	21.38	1
m. Krosno	33.36	7.4	26.29	100.00	2
jarosławski	28.89	18.5	24.21	37.17	3
lubaczowski	28.83	17.9	23.50	34.27	3
przemyski	27.37	20.1	21.69	0.00	3
przeworski	28.19	18.4	20.70	26.75	3
m. Przemyśl	32.32	18.4	30.76	100.00	2
kołbuszowski	26.63	16.7	25.32	14.87	1
łańcucki	27.88	16.8	26.10	22.96	1
ropczycko-sędziszowski	26.71	18.7	20.58	31.27	3
rzeszowski	27.08	13.1	23.20	16.87	3
strzyżowski	27.57	22.5	23.92	14.17	1
m. Rzeszów	30.23	7.6	30.61	100.00	2
dębicki	28.22	11.7	22.18	40.35	3
leżajski	28.43	18.3	22.39	29.32	3
mielecki	28.59	13.9	25.04	48.80	3
nizański	28.51	23.6	27.40	35.59	1
stalowowolski	31.84	14.7	29.57	58.97	2
tarnobrzeski	29.41	14.8	24.23	23.66	3
m. Tarnobrzeg	33.58	14.2	28.50	100.00	2
Świętokrzyskie Voivodeship					
kielecki	28.12	18.8	24.23	6.59	1
konecki	32.26	22.1	31.36	31.22	3
ostrowiecki	34.55	20.6	30.86	68.56	3
skarżyski	34.30	25.6	35.02	72.11	3
starachowicki	32.52	17.3	33.59	58.45	3
m. Kielce	33.72	10.6	34.74	100.00	3
buski	31.34	9.0	20.67	22.96	2
jędrzejowski	31.19	13.5	24.70	30.14	2
kazimierski	31.18	11.5	19.52	19.77	2

opatowski	31.27	19.5	24.93	20.54	1
pińczowski	32.41	9.4	24.02	30.03	2
sandomierski	31.00	11.8	21.47	35.84	2
staszowski	30.87	11.8	21.71	34.65	2
włoszczowski	30.50	14.6	27.94	22.94	1
Zachodniopomorskie Voivodeship					
białogardzki	30.76	30.8	34.77	67.48	2
drawski	32.78	25.9	34.82	62.33	2
kołobrzeski	33.50	12.5	37.72	58.24	1
koszaliński	31.10	26.7	34.78	21.45	2
ślawieński	31.53	22.6	37.86	47.12	2
szczecinecki	32.29	26.4	34.12	64.48	2
świdwiński	32.68	27.5	34.09	49.49	2
walecki	32.05	19.8	34.81	60.84	3
m. Koszalin	34.00	11.0	43.48	100.00	1
choszचेński	31.95	26.1	31.48	47.80	3
gryficki	32.23	24.0	30.75	50.70	3
myśliborski	32.24	16.9	32.12	58.96	3
pyrzycki	31.69	28.3	30.60	42.09	3
stargardzki	32.27	20.2	29.46	65.93	3
łobeski	32.10	27.6	33.32	53.03	2
m. Szczecin	32.77	9.7	38.02	100.00	1
goleniowski	31.44	18.4	31.83	52.83	3
gryfiński	31.76	23.4	30.25	45.75	3
kamieński	34.67	27.0	34.67	52.42	2
policki	31.13	16.1	33.08	50.00	3
m. Świnoujście	37.24	11.9	38.44	100.00	1

Source: own elaboration prepared on the basis of: IBC GROUP Central Europe Holding S.A. & ARC Rynek i Opinia Sp. z o. o., The methodological report "Carrying out a nationwide study aiming at drafting the Diagnosis of the current situation of women and men aged 50+ on the labour market in Poland" Warszawa 2012.

The internal and external homogeneity was defined by the Silhouette index, implying that the clustering procedure was correct. Subsequently, the classification of districts in each Voivodeship was carried out on the basis of the group assignment. As it results from drawing 4, the obtained classification can be regarded as at least correct, which, taking into consideration the small number of subjects and the set of only four partial variables, can be regarded as a satisfactory result.

Drawing 4: Evaluation of quality of classification of districts using the Silhouette index

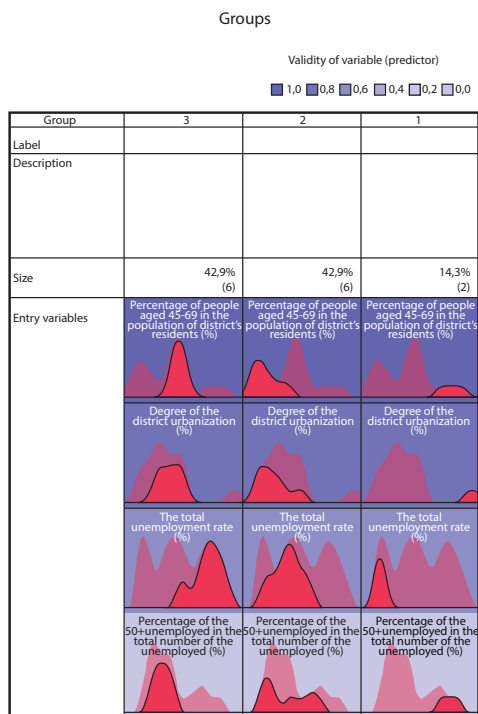


Source: own elaboration prepared on the basis of: IBC GROUP Central Europe Holding S.A. & ARC Rynek i Opinia Sp. z o. o., The methodological report "Carrying out a nationwide study aiming at drafting the Diagnosis of the current situation of women and men aged 50+ on the labour market in Poland" Warszawa 2012.

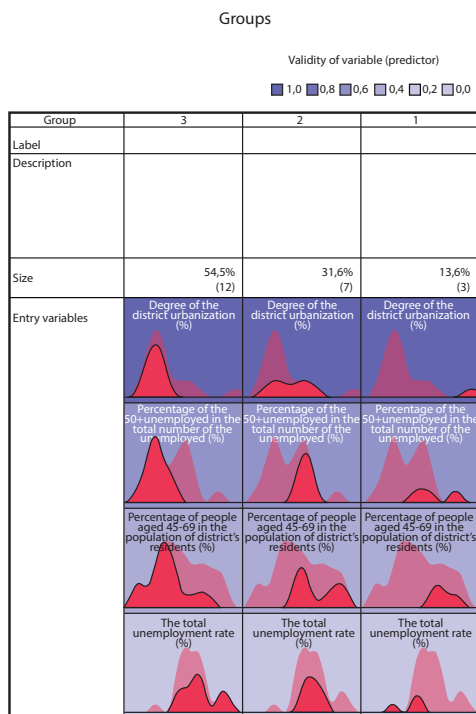
Features of districts classified under individual clusters are presented in drawing 5.

Drawing 5: Graphic image of district segmentation in individual voivodships

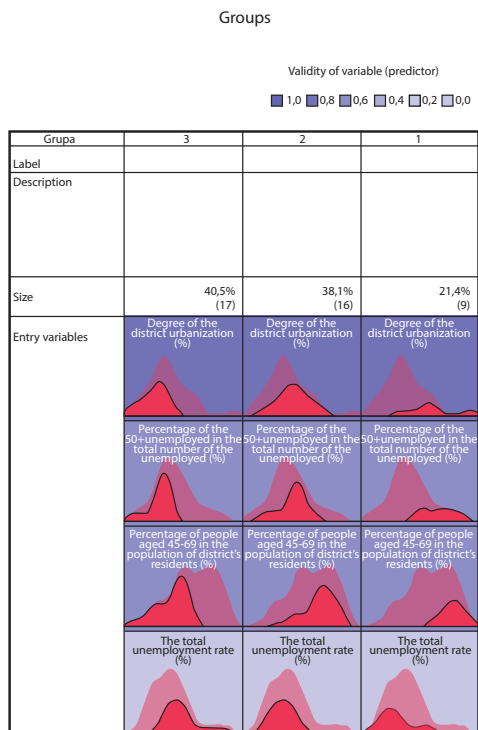
Lubuskie Voivodeship



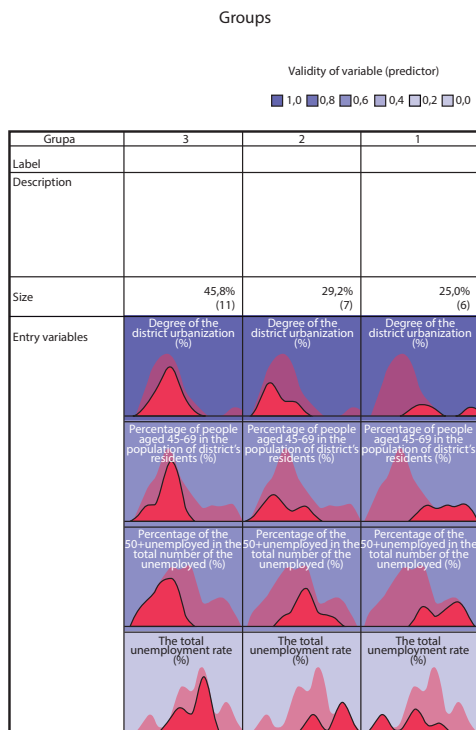
Małopolskie Voivodeship



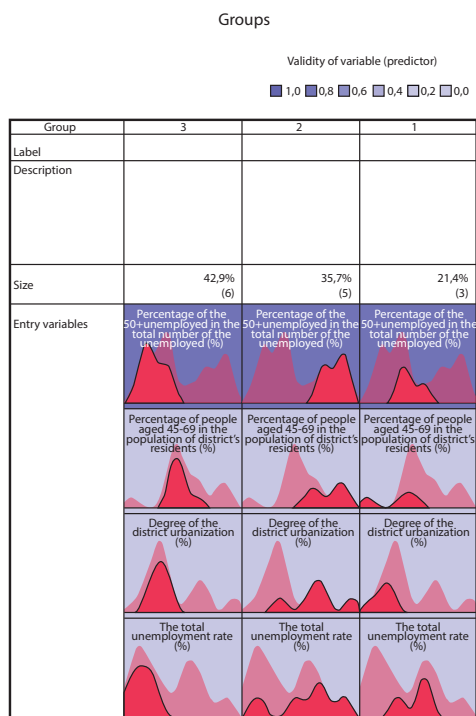
Mazowieckie Voivodeship



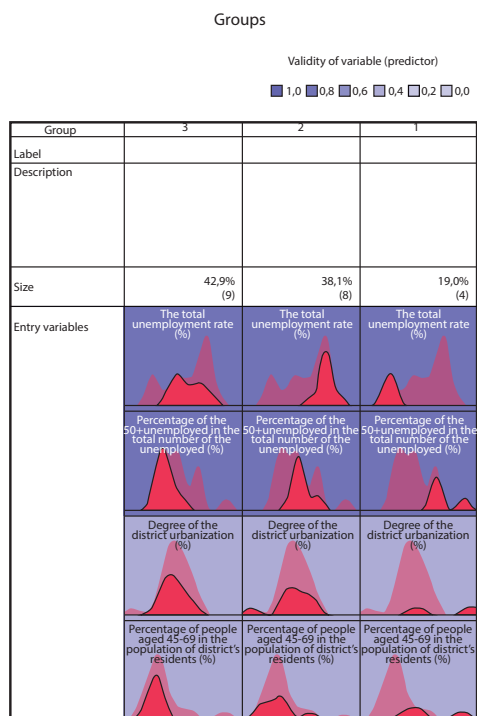
Podkarpackie Voivodeship



Świętokrzyskie Voivodeship



Zachodniopomorskie Voivodeship



Source: own elaboration prepared on the basis of: IBC GROUP Central Europe Holding S.A. & ARC Rynek i Opinia Sp. z o. o., The methodological report "Carrying out a nationwide study aiming at drafting the Diagnosis of the current situation of women and men aged 50+ on the labour market in Poland" Warszawa 2012.

Selected segments in individual Voivodeships were not equivalent. The proportions of the districts within a given segment were conditioned by the degree of the predictor validity. It has to be underlined that the features of the districts belonging to individual groups (clusters) in individual Voivodeships are different i.e. one cannot assume that – for example – districts assigned to cluster 1 in Lubuskie Voivodeship have the same characteristics like districts assigned to the same cluster in Małopolskie Voivodeship. Features of districts in individual clusters in researched Voivodeships are as follows:

- **Lubuskie Voivodeship**

Cluster 1 (14.3% districts on the territory of the Voivodeship): low level of demographic dependency of the district, low level of the district urbanization, high total unemployment rate, relatively low percentage of people aged 50+ in the total number of the unemployed.

Cluster 2 (42.9% districts on the territory of the Voivodeship): high level of demographic dependency of the district, high level of the district urbanization, high total unemployment rate, high percentage of people aged 50+ in the total number of the unemployed.

Cluster 3 (42.9% districts on the territory of the Voivodeship): medium level of demographic dependency of the district, low level of the district urbanization, high total unemployment rate, medium percentage of people aged 50+ in the total number of the unemployed.

- **Małopolskie Voivodeship**

Cluster 1 (54.5% districts on the territory of the Voivodeship): high level of demographic dependency of the district, high level of the district urbanization, high total unemployment rate, high percentage of people aged 50+ in the total number of the unemployed.

Cluster 2 (31.8% districts on the territory of the Voivodeship): high level of demographic dependency of the district, low level of the district urbanization, high total unemployment rate, high percentage of people aged 50+ in the total number of the unemployed.

Cluster 3 (13.6% districts on the territory of the Voivodeship): low level of demographic dependency of the district, low level of the district urbanization, high total unemployment rate, relatively low percentage of people aged 50+ in the total number of the unemployed.

- **Mazowieckie Voivodeship**

Cluster 1 (40.5% districts on the territory of the Voivodeship): high level of demographic dependency of the district, high level of the district urbanization, high total unemployment rate, high percentage of people aged 50+ in the total number of the unemployed.

Cluster 2 (38.1% districts on the territory of the Voivodeship): medium level of demographic dependency of the district, medium level of the district urbanization, medium total unemployment rate, medium percentage of people aged 50+ in the total number of the unemployed.

Cluster 3 (21.4% districts on the territory of the Voivodeship): low level of demographic dependency of the district, low level of the district urbanization, high total unemployment rate, relatively low percentage of people aged 50+ in the total number of the unemployed.

- **Podkarpackie Voivodeship**

Cluster 1 (29.2% districts on the territory of the Voivodeship): medium level of demographic dependency of the district, medium level of the district urbanization, medium total unemployment rate, medium percentage of people aged 50+ in the total number of the unemployed.

Cluster 2 (25% districts on the territory of the Voivodeship): low level of demographic dependency of the district, low level of the district urbanization, high total unemployment rate, medium percentage of people aged 50+ in the total number of the unemployed.

Cluster 3 (45.8% districts on the territory of the Voivodeship): high level of demographic dependency of the district, high level of the district urbanization, high total unemployment rate, high percentage of people aged 50+ in the total number of the unemployed.

- **Świętokrzyskie Voivodeship**

Cluster 1 (21.4% districts on the territory of the Voivodeship): low level of demographic dependency of the district, low level of the district urbanization, high total unemployment rate, high percentage of people aged 50+ in the total number of the unemployed.

Cluster 2 (42.9% districts on the territory of the Voivodeship): high level of demographic dependency of the district, high level of the district urbanization, high total unemployment rate, high percentage of people aged 50+ in the total number of the unemployed.

Cluster 3 (35.7% districts on the territory of the Voivodeship): low level of demographic dependency of the district, low level of the district urbanization, medium total unemployment rate, high percentage of people aged 50+ in the total number of the unemployed.

- **Zachodniopomorskie Voivodeship**

Cluster 1 (19.0% districts on the territory of the Voivodeship): low level of demographic dependency of the district, low level of the district urbanization, medium total unemployment rate, medium percentage of people aged 50+ in the total number of the unemployed.

Cluster 2 (38.1% districts on the territory of the Voivodeship): medium level of demographic dependency of the district, medium level of the district urbanization, high total unemployment rate, high percentage of people aged 50+ in the total number of the unemployed.

Cluster 3 (42.9% districts on the territory of the Voivodeship): high level of demographic dependency of the district, high level of the district urbanization, medium total unemployment rate, high percentage of people aged 50+ in the total number of the unemployed.

On the basis of the list of 138 entities, a matrix of criterion variables was selected. In the case of 4 criterion variables, the average measure of the indicator "percentage of people aged 45-69 in the population of the district's residents" was chosen for the reference variable for

each segment. From the perspective of the research problems, this indicator seemed essential. The adopted procedure would guarantee conducting the research in districts diversified from the perspective of the total unemployment rate, the percentage of the unemployed 50+ in the total number of the unemployed and the degree of urbanization, but from the perspective of the demographical "old age" it would exclude districts with a particularly high level of demographic dependency. That is why the sampling of the districts within the segment finally assumed an average value and the diversification with regard to the mean, taking into consideration outliers (districts with a particularly low or high demographic dependency). In the event when there was township and country district (e.g. the city of Koszalin and the Koszaliński district), we used the procedure of substitution of the nearest analogical unit due to the overlapping of the observation units.

Finally, we selected districts whose list is presented in tab. 17.

Table 17. List of districts selected for the sample in the qualitative research of the *Diagnosis*

Voivodeship	Cluster (group) 1	Cluster (group) 2	Cluster (group) 3
lubuskie	Gorzów Wielkopolski city	międzyrzecki żagański	świebodziński wschowski
małopolskie	myślenicki limanowski nowosądecki nowotarski	krakowski wielicki oświęcimski	Tarnów city
mazowieckie	garwoliński siedlecki białobrzegi przasnyski sierpecki makowski przysuski	wołomiński piaseczyński miński lipski gostyniński	otwocki Ostrołęka city Płock city
podkarpackie	kolbuszowski leski bieszczadzki	m. Rzeszów m. Krosno	ropczycko-sędziszowski przemyski przeworski tarnobrzeski
świętokrzyskie	kielecki	staszowski pińczowski	konecki ostrowiecki
zachodniopomorskie	Szczecin city Świnoujście city	białogardzki drawski kamieński	policki goleniowski stargardzki

Source: own elaboration prepared on the basis of: IBC GROUP Central Europe Holding S.A. & ARC Rynek i Opinia Sp. z o. o., The methodological report "Carrying out a nationwide study aiming at drafting the diagnosis of the current situation of women and men aged 50+ on the labour market in Poland" Warszawa 2012.

The problem to reach target groups generated the problem of operational definition of the target population, including a complete definition and verification of the entities belonging to the researched population in the selected Voivodeships. From the formal point of view, in the case of research containing entities diversified from the perspective of typological variables, we deal with operationally tautological procedure, according to which the (operational) definition of the researched population is equivalent, in terms of its scope, to its description in the form of sampling frame which is partly verified and constructed in the course of the research. The problem concerned also the choice of entities in the conducted qualitative research. Within the scope of the selection of the observation units, the typological representativeness of units selected for 50 districts was guaranteed. Each unit classified under the research was described by a template – the survey form. The template was filled out on the stage of the unit identification but also during the field realization of the research because of the specificity of descriptive data (e.g. premises data).

In the case of each module, a list of entities diversified by selection criteria was drafted as follows:

- list of employers was prepared on the basis of the data base of HBI Polska „Polish Companies 2012“;
- list of DLOs was prepared on the basis of the data base created by the research company (contractor of the field stage of the research);
- list of employment agencies, training institutions, organizational units of social welfare was prepared on the basis of ENIRO base,
- list of non-governmental organizations was prepared on the basis of KLON/JAWOR³⁵ base.

In each type of institutions, we carried out studies with respondents who occupied suitable posts, which made them good sources of information and allowed to follow planned instructions.

Respondents in the research:

1. of district labour offices belonged to the management of the offices, particularly managers of the labour office departments;
2. of organizational units of social welfare belonged to the management of OUSW and people able to evaluate the implementation of the strategies for the economic activation of people aged 45+ in the labour market achieved by OUSW;

³⁵ The point of departure for the selection of the sample was the list of organizations selected on the basis of the analyses carried out on the stage of desk research, within the task 3 of the project “Equal opportunities on the labour market for people aged 50+” (cf. M. Sobczak, *Third sector and its operations in the area of professional activation of people aged 50+ (45+)*, Łódź 2010). In the course of research procedures, 9049 organizations operating in the area of the unemployment and economic growth were selected. Among them, we chose the organizations which between 2004 – 2010 carried out projects of the professional activation of people aged 45+. In the next stage, we selected the following types of projects: (i) projects directly aimed at the researched age group, (ii) projects aimed at broadly understood group of older people or so called senior citizens, and (iii) projects in which people aged 45+ were distinctly targeted as a preferred group to participate in the project or constituted the majority of participants in the project. In this way a preliminary data base was created and afterwards, supplemented with organizations and projects which were identified on the basis of project bases of the Operational Programme Human Capital and Civic Initiatives Fund prepared as a result of Task 1 of this project. Consequently, we verified the completeness of the base by comparing it to websites of the institutions implementing projects financed by the European Union and checking lists of tenders selected for the realization of projects within the professional activation of people aged 45+. As a result, the created base of NGOs carrying out projects for the benefit of people aged 45+ had around 100 organizations from whole Poland operating in various organizational and legal forms, and with diverse objectives. Main areas of their operations included: fight with unemployment, stimulation of local development, social inclusion. The research of the *Diagnosis* involving 50 districts in the 6 chosen provinces required – on the one hand – omitting organizations with other location than the chosen one, and on the other hand – supplementing the list with non-governmental organizations operating on the territory of chosen districts (i.e. with their registered offices or operating in a given district) and not carrying out operations strictly aimed at people aged 45+. The research company (the performer of the field research for the *Diagnosis*) used for this aim the KLON/JAWOR Base.

3. of non-governmental organizations consisted of the representatives of the organization authorities, employees and volunteers involved in the execution of projects regarding the economic activation of people aged 45+ or people chosen by the organization authorities as the most competent because of their roles in the organization;
4. of employment agencies belonged to the management and owners of EA, consultants and project managers responsible for recruitment, selection of candidates and evaluation of competences;
5. of training institutions consisted of owners or directors of TI, managers of training facilities and coaches responsible for preparing and conducting trainings aimed at people aged 45+;
6. of employers consisted of owners of companies, members of the management (chairmen, vice-chairmen, executive officers, HR managers) with practical experience in HR management and sufficient knowledge of labour law regulations and other aspects related with the labour market. In rare cases, employees responsible for HR issues in a given entity, meeting the above-mentioned requirements concerning knowledge of labour law regulations and experience in HR management in a given entity, were assigned to participate in the research.

The field stage caused many problems connected with obtaining consents for the research from potential respondents (difficulties are well depicted by the fact that in case of non-governmental organizations there were 150 contact attempts to carry out 50 interviews and in e.g. employment agencies there were 209 attempts), that is why we accepted the possibility of substitution of entities in the event when it was impossible to identify observation units of a given type in the area of a given district or when representatives of such entities refused to participate in the research. For this aim, we prepared an index of reserve districts identical/equivalent to the replaced districts (within the area of each Voivodeship).

In the realization stage the following substitution operations were performed:

1. substitution of 9 districts in the research of district labour offices;
2. substitution of 9 districts in the research of organizational units of social welfare;
3. substitution of 3 districts in the research of non-governmental organizations.

As it was underlined earlier, in reference to the research of employment agencies, training institutions and employers there were no requirement concerning the location of a given entity in 50 selected districts. Therefore, the scale of deviations from the list of tab. 17 is much bigger, which, however, is not to the significant detriment of the research results. Consequently:

1. in the case of the research of employment agencies, 39 districts were not included in the study and the differences resulted mainly from the fact that towns with district rights were repeatedly represented in the sample i.e. they had more than one research entity;
2. in the case of the research of training institutions, 33 districts were not included in the study, with an analogical reservation like in the event of employment agencies;
3. in the case of the research of employers, 5 districts were substituted and they were replaced by other administrative entities (each district occurred in the sample only once).

4.4. Trainings and supervision

4.4.1. Trainings of interviewers in qualitative research

The research was preceded by trainings of the interviewers in which representatives of UŁ team participated. Training materials and the oral content contained all required by QCSC information (size and structure of the sample, deadlines, dates of individual measurements, locations, sampling criteria, definitions of cases excluded from the research, templates of

documentation for each stage of the research, comments and detailed instructions, list of materials which an interviewer has to gather, manuals of technical equipment – tape recorders). At the training, the whole research project was presented, paying special attention to the requirements regarding the way of conducting the interview. It was underlined that prepared instructions/scenarios for individual in-depth interviews (IDI) and non-standardised interviews were not ready-made models of questions but only a list of searched information which the interviewer should get from the respondent. The procedure of question asking, its sequence, details and behaviour of the interviewer should be adjusted to the individual respondent, since the individualized research approach is a very desirable element of the qualitative research. During the training, apart from methodological information, the interviewers learned about specificity of operations of each of the institutions selected in the *Diagnosis* and the elements to which they should paid special attention.

4.4.2. Supervision procedures in qualitative research

The control of the quality of gathered data and data protection consisted of a global evaluation of the collected material and the interviewers' work, and was conducted on the basis of the ESOMAR standards. The main aim of the control was to evaluate the interviewers' work and to verify whether tasks assigned to them were performed according to the requirements present in the instructions for the research and what mistakes and artefacts occurred during the data collection. These principles were in accordance with the general principles and norms of the interviewer's work.

In compliance with QCSC the following were applied:

- Direct supervision of the interviewer by a supervisor;
- Control of response rate of the interview and the researched subjects;
- Control of the use of the qualitative research methodology which reduce mistakes and contaminations of the interview formats..

The supervision in the qualitative research took place in two stages. First of all, during the recruitment, the field manager upon receiving data of recruited respondents, decided whether they meet the sampling criteria (e.g. was the institution selected properly? is the respondent a competent person with sufficient knowledge to be a valuable source of information?) Secondly, the quality of the conducted interview was verified on the basis of the recordings or transcripts of the interviews.

Field supervision included not less than 5% of the cases, logical supervision – not less than 10%. Supervising was conducted according to the specific scheme reflected in this report. When a mistake on a larger scale was noticed, the research was stopped and the project manager performed a supplementary training. The selection of interviews/ interviewers subject to supervision constituted an important element of the performed supervision. It was based on several guidelines:

1. Interviewers who made mistakes earlier were controlled particularly often;
2. All the interviewers were subject to supervision.

Logical supervision was conducted by means of standard methods. General guidelines regarding error classification were used. In the case of qualitative research, apart from the analysis of cohesion and completeness included in the recruitment questionnaire, data of respondents were controlled on the e-PKJPA platform. As a result of field and logical supervision, reports compliant with the requirements of e-PKJPA were created. Every time reports are transferred as feedback information and as the basis of final statement to regional coordinators, recruiters, researchers and auditors.

Apart from the supervision conducted by the research company, the gathered material was verified also, in similar way, by the representative of the UŁ team. Special attention was paid to: correct selection of researched institutions, correct selection of the respondent in

each of the researched institution, correct manner of interviewing (among others: individual approach to every respondent, deepening the subject of the discussion by asking more questions), correct manner of writing transcripts (among others: their completeness, distinguishing among responses of several respondents if the interview was conducted with more than one person) and correct filling out of survey forms.

4.4.3. Anonymity procedures in qualitative research

In order to be able to reconstruct the content of the qualitative interview, its course – upon receiving the respondent's consent – was registered on the audio carrier. In order to maintain the standards of ESOMAR and PKJPA, the respondents' answers were anonymous and the interviewer before starting the actual interview was obliged to give information about the researched in a form of an individual code containing information directly concerning the researched person: name, surname and occupied post. The anonymity procedure allowed to obtain from the respondents more reliable information on a given subject, since they were sure that their answers would not be personalized. Contact details were also encoded for the duration of the interview to provide the respondent with a higher comfort of the interview. During the stage of data processing and report drafting, respondents' quotations were marked with a number of the interview and were defined by a type of institution and the Voivodeship where the research was conducted (an exemplary notation: *commune centre of social welfare (GOPS), Mazowieckie Voivodeship, interview 22*).

The audio carriers on which the interviews were recorded contain the content of the interview, the respondent's code and the type of the entity represented by the researched. The audio carriers are stored in the office of the research company, in a locked room not accessible to third parties who are not employees of consortium IBC & ARC.

4.5. Methods of analysis for qualitative research results

All the conducted interviews (individual in-depth interviews and non-standardised interviews) were transcribed according to the chronology of the interviews, meaning the sequence of the issues discussed during the interview was the same as in the transcript. Afterwards, the qualitative data were vertically analysed (according to problems described in the research questions) and used to draw conclusions. Key issues touched upon in the report (analysed during the conducted research) were illustrated by quotes of respondents. In the case of qualitative data, some amount of unnecessary data, adding no new information, is gathered. On the other hand, the part of information essential to the research is "divided" between various answers of the respondent, which makes it hidden in the entirety of the empirical material. That is why in the analysis of qualitative data, the stage of so called reduction is so important. The redundant information is eliminated and the essential information displayed. In the suggested model of analysis, it took place through isolating issues and searching for common and different features in the analysis scheme. The isolated issues were subject to analysis to determine the regularity between similarities and differences in the examined phenomena. On this stage, a set of generalizations was prepared. It concerned the whole empirical material collected, assuming that the analysis took into consideration also outliers. The last stage of the qualitative research analysis was juxtaposing the obtained generalizations with the all information on the examined subjects and answering the research questions. The quantification of the qualitative data was not performed by entering data into the specialist software like ATLAS.ti, but we concentrated on the analysis of the narrative.

The obtained material allowed for the analysis of regularity, the analysis of text and operations comprehension, the analysis of reflection etc. The qualitative material does not give

the possibility, although such attempts are made, to divide it into variables in the sense that exists in the statistical analysis. Here measurements have much broader meaning which goes beyond assigning numeric values to features of examined people. Measurements can be also understood as assigning meanings, through interpretation, to various contents. The qualitative analysis is usually limited to such understanding of the measurements and it consists of systematically division of the content (spoken or expressing in any other way) registered by the researcher. It could be assumed that a text with its commentary is a measuring unit and an archiving unit of the qualitative analysis. The results of the research were described according to the logic of the research instrument. Reports on the individual qualitative modules (modules 3-8) contain synthetic and cross-sectional representation of the research results compliant with the adopted methodology.

4.6. Experts' panel discussion

The carried out research allowed to analyse the current situation of women and men aged 45+ in Poland and to formulate conclusions regarding the directions of changes in the problem areas. The results of the *Diagnosis* constituted a basis to launch a discussion among experts involved in shaping the employment policy and the social policy on the state and regional levels as well as social partners included in the operations favouring the provision of equal opportunities for people aged 45+.

The experts' panel discussion took place on 27th July 2012 in andel's Hotel in Łódź. 21 people representing the following groups participated in the panel discussion:

- (1) representatives of the researched groups of stakeholders i.e. district labour offices, representatives of non-public employment agencies, training institutions, non-governmental organizations and entrepreneurs – 8 people;
- (2) representatives of province offices involved in shaping the employment policy and the social policy on the regional level (PLO) – 3 people;
- (3) experts in the area of the economic activation of people at the immobile working age on the Polish labour market – 3 people;
- (4) representatives of the Partner of the project– University of Łódź – 5 people;
- (5) Project managers from the research company – 2 people.

The experts' panel discussion was conducted in accordance with the framework scenario which can be found in the annexes of this document. Participants of the panel discussion were familiarized with the results of the research (few days prior to the meeting, a synthesis of research results was sent to the participants, the experts' panel discussion began with a presentation of the most important results of the *Diagnosis*).

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Website: www.ofbor.pl [entered on 9 August 2012]

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The research instruments for *Diagnosis of the current situation of women and men aged 50+ on the labour market in Poland*

MODULE 1.
THE QUANTITATIVE RESEARCH OF PEOPLE
AGED 45+

QUESTIONNAIRE OF THE SURVEY RESEARCH

among

**PEOPLE AGEDAGED 45-69 RESIDING
IN
POLAND**

Introduction

Good Morning. My name is (name and surname of the interviewer). I am an employee of ARC Rynek i Opinia Research Institute located in Warsaw in Słowackiego 12 Street. At the request of Ministry of Labour and Social Policy, the University of Łódź together with Centrum Rozwoju Zasobów Ludzkich execute a research project regarding the provision of equal opportunities for people aged 45 and over on the Polish labour market since they experience more and more difficulties in finding jobs or maintaining their jobs due to their age. You have been selected for the research of the nationwide PESEL base in accordance with provisions of Ministry of the Interior.

The study conducted within the project "Equal opportunities in the labour market for people aged 50+" co-financed by the European Social Fund at the request of Centrum Rozwoju Zasobów Ludzkich with the Łódź University.

Your answers will remain anonymous, which means they will be presented exclusively in a form of collective statistical data and will not be revealed to anyone.

HOUSEHOLD OF THE RESPONDENT			
P1	Please enumerate all the people living with you in a common household.		
	Remark for the interviewer: in the case of children and other dependents, in the column "main source of support" please write N/A		
	Degree of kinship with the respondent	Year of birth	Main source of support (<i>instructions</i>)
1	Respondent		
2			
3			
4			
5			
6			
7			
OCCUPATIONAL SITUATION OF THE RESPONDENT			
P2	Which of the enumerated categories describes your current occupational situation in the most accurate manner? (Respondent's card)	1 I retired (including earlier retirement) and I do not work <i>Go to P3;</i>	<input type="text"/>
		2 I retired but I am active economically <i>Go to P3</i>	
		3 I am permanently ill or disabled and I receive pension due to the incapacity to work <i>Go to P13</i>	
		4 I receive disability pension but I am still active economically <i>Go to P13</i>	
		5 I am employed on a contract for specified period of time <i>Go to P16</i>	



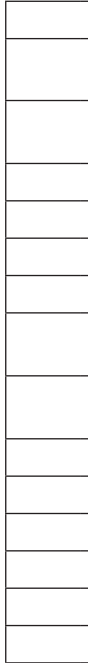
- 6 I am employed on a contract for unspecified period of time *Go to P16*
- 7 I am employed on a civil-law contract *Go to P16*
- 8 I conduct a business activity *Go to P28*
- 9 I have my own farm *Go to P35*
- 10 I work without remuneration for my own family business or family farm *Go to P46*
- 11 Other type of work (what?) *Go to P16*
- 12 I am unemployed and currently, I am searching for a job *Go to P42*
- 13 I am unemployed and currently, I am not searching for a job *Go to P42*
- 14 I keep house (including taking care of a household, family and grandchildren) *Go to P46*
- 15 I am not economically active; I support myself from other non-profit sources (what?)
(A: e.g. Savings, interest on capital etc.) *Go to P46*
- 16 I have an unregistered job (so called “grey market”)**

Questions P3 – P12 concern respondents who chose the answer 1 or 2 in P2 (only the retired people)

P3 When did you retire? month year
A: concerns also the earlier retirement and pre-retirement benefits)

P4 Could you work in the same place after obtaining the right to retire?

- 1 Due to the right to retire
- 2 Due to **the right to retire earlier or the right to receive pre-retirement benefits** *Go to P7*
- 98 Refusal to answer (*do not read*)

<p>P5 Could you work in the same place after obtaining the right to retire?</p>	<p>1 Yes 2 No 99 I do not know (<i>do not read</i>)</p>	<p><i>Go to P7</i> <i>Go to P7</i></p>	
<p>P6 What were the circumstances? <i>Interviewer: read the cafeteria.</i></p> <p><i>Go to P8</i></p>	<p>1 I did not want to retire, I wanted to work in the same place on the same post, and the employer allowed me to do so 2 I did not want to retire, I wanted to work on a less demanding post, and the employer allowed me to do so 3 I wanted to retire but at employer's prompting I postponed my decision 4 I retired but I earned extra money in my previous workplace 5 Other situation (what?)</p>		
<p>P7 What persuaded you to retire? Please tick maximally 3 the most important reasons. Which reason was the most important, meaning which would you place as the first? Which as the second and the third? <i>Interviewer: read out the answers and give the respondent the respondent's card. (We ask only about the reasons that the respondent has given i.e. if he/she gave only one reason we do not ask any more questions, if two – we ask about the importance of the two) (Respondent's card) Attention DP: plan how to write down the 1st, 2nd and 3rd reason</i></p>	<p>1 My own health problems 2 Health problems of a member of my family or an adopted person 3 I wanted to retire at the same time as my spouse/partner 4 I wanted to spend more time with my family 5 I wanted to enjoy my life 6 Work was physically too exhaustive to me 7 Work was mentally too exhaustive to me 8 I wanted to take care of my children or grandchildren 9 Income of my family was sufficient for me to stop working 10 I felt tired and occupational burnt out 11 I was dismissed 12 I wanted to use such opportunity when I had it 13 Inne powody (jakie?) 97 Other reason (what?) 98 Refusal to answer (<i>do not read</i>)</p>		

<p>P8 Have you ever worked in your profession for remuneration while retired? <i>Interviewer: read the cafeteria, points 2 – 5.</i></p>	<p>1 No 2 Yes, on the basis of an employment contract 3 Yes, on the basis of a civil-law contract 4 Yes, informally 5 Yes, I helped younger members of my family/ neighbours to run a business 98 Refusal to answer (<i>do not read</i>)</p>	<input type="checkbox"/>											
<p>P9 Do you currently do any work for remuneration?</p>	<p>1 Yes 2 No 98 Refusal to answer (<i>do not read</i>)</p>	<input type="checkbox"/>											
<p>P10 Have you ever worked in your profession without remuneration while retired (e.g. for a member of family, friends, organizations)?</p>	<p>1 Yes 2 No 98 Refusal to answer (<i>do not read</i>)</p>	<input type="checkbox"/>											
<p>P11 Do you currently do any work without remuneration?</p>	<p>1 Yes 2 No 98 Refusal to answer (<i>do not read</i>)</p>	<input type="checkbox"/>											
<p>P12 What persuaded you to take up work for remuneration? (A: in case of currently working – Attention DP: P9 = 1) What would persuade you to take up work for remuneration? (A: in case of currently not working – Attention DP P9 = 2 or 98) Which reason is the most important, meaning which would you place as the first? Which as the second and the third? Attention DP (We ask only about the reasons that the respondent has given i.e. if he/she gave only one reason we do not ask any more questions, if two – we ask about the importance of the two) (Respondent's card)</p>	<p>1 The possibility to work on a part-time basis 2 The possibility to work at home 3 Flexible adjustment of working hours to my needs 4 Providing external, publicly co-financed care of my grandchildren (kindergarten, crèche) 5 Providing external, publicly co-financed care of older people who I currently take care of 6 Providing external, publicly co-financed care of chronically ill people or people with disabilities who I currently take care of 7 Retaining entitlements to benefits (social, retirement benefits etc.) 8 Greater support of other members of family 9 The possibility to obtain free occupational retraining 10 Job offer with comfortable working hours 11 Job offer in the neighbourhood of the place of residence</p>	<table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>											

- 12 Other reasons (what?)
- 13 None from the above, I do not intend to take up a job

Questions P13 – P15 concern respondents who chose the answer 3 or 4 in P2 (only pensioners)

- P13 You said that you are chronically ill or disabled. Is the origin of this condition connected with work?
- 1 Connected with work
 - 2 Not connected with work
 - 98 Refusal to answer (*do not read*)

- P14 Is your condition an obstacle to take up any economic activity?
- 1 No (*przejdź do P48*)
 - 2 Yes
 - 97 Hard to say (*do not read*)

- P15 Please have a look at the possible reasons of not employing chronically ill people and people with disabilities. Please give three that describe your situation the best. Which reason is the most important, meaning which would you place as the first? Which as the second and the third?
(We ask only about the reasons that the respondent has given i.e. if he/she gave only one reason we do not ask any more questions, if two – we ask about the importance of the two)
(Respondent's card)
- 1 Employers prefer employing able-bodied person even if she/he has lower qualifications
 - 2 My illness/disability considerably lowers my self-esteem, I do not believe in my possibilities
 - 3 I do not believe that in the current health condition I could perform any work without detriment to my health
 - 4 Many people treat chronically ill people or people with disabilities badly in the workplace
 - 5 Architectural, communication barriers that cause problems with reaching the workplace
 - 6 Other reasons (what?)

Questions P16 – P27 concern respondents who chose the answer 5, 6,7 or 11 in P2 (only employed people)

- P16 What is the proprietorship form of the institution which is your main workplace?
- Interviewer: read the cafeteria (points 1-5)*
- 1 Public
 - 2 Private, exclusively Polish capital
 - 3 Private, predominance of Polish capital
 - 4 Private, predominance of foreign capital
 - 5 Non-profit organization (foundation, association)
 - 97 Hard to say (*do not read*)

P17	Is your main workplace located in the same locality as your place of residence?	1 Yes 2 No	<input type="checkbox"/>
P18	What post do you occupy in your main workplace? Interviewer: read the cafeteria if needed	1 Unskilled employee 2 Skilled employee/ worker position 3 Specialist (white-collar worker, qualification required) 4 Auxiliary administrative staff (white-collar worker, qualification required) 5 Managerial post	<input type="checkbox"/>
P19	What kind of works do you perform in your main workplace? Interviewer: read the cafeteria if needed	1 Specialist 2 Managerial 3 Other independent 4 Basic (production, services etc.) with a low physical workload 5 Basic (production, services etc.) with a moderate physical workload 6 Basic (production, services etc.) with a high physical workload 7 Auxiliary administrative 8 Other auxiliary 9 Other works (what?)	<input type="checkbox"/>
P20	How many employees are there employed in your main workplace? <i>Interviewer: concerns all the forms of employment such as employment contract for specified period of time and unspecified period of time, contract for specific work, civil-law contract and others.</i> <i>(pre-categorized question)</i> <i>Interviewer: of needed, read the cafeteria.</i>	1 Up to 9 people 2 from 10 to 49 people 3 from 50 to 249 people 4 from 250 to 999 people 5 1 k or more people 99 I do not know (do not read)	<input type="checkbox"/>
P21	What kind of employment contract you have concluded in your main workplace? Interviewer: read the cafeteria if needed	1 contract for specified period of time 2 contract for unspecified period of time 3 contract for the period of performing a given task 4 civil-law contract 5 Other contract (what?)	<input type="checkbox"/>
P22	W jakim wymiarze czasu pracuje Pan/i w głównym miejscu pracy?	1 W pełnym wymiarze czasu pracy 2 W niepełnym wymiarze czasu pracy 3 W zadaniowym czasie pracy	<input type="checkbox"/>

P23	Do you work overtime?	1 Yes 2 No 98 Refusal to answer (<i>do not read</i>)	<i>Go to P25</i>	<input style="width: 60px; height: 40px;" type="text"/>			
P24	How many hours you work overtime per month?	<i>Estimated number of hours</i>		<input style="width: 150px; height: 30px;" type="text"/>			
P25	Do you belong to any trade union?	1 Yes 2 No 99 I do not know (<i>do not read</i>)	<i>Go to P28</i>	<input style="width: 60px; height: 40px;" type="text"/>			
P26	Czy należy Pan/i do związków zawodowych?	1 Yes 2 No 98 Refusal to answer (<i>do not read</i>)	<i>Go to P25</i>	<input style="width: 60px; height: 40px;" type="text"/>			
P27	Do trade unions support employees aged 45+ in the company you currently work for in the following situations:						
	Attention Interviewer, in the situation when the respondent is not sure whether he/she can give opinion on all the trade unions or only on specific cases, please add: answer the question on the basis of your own observations and experiences						
		Very often	Often	Rarely	Never	Hard to say	
Trade unions protect employees aged 45+ against dismissals							
Trade unions protect employees aged 45+ against pay discrimination							
Trade unions protect employees aged 45+ against discrimination in the area of trainings and development							
Trade unions try to make sure that the employer dismissing an employee aged 45+ helps him/her to find a new job							

Questions P28 – P34 concern respondents who chose the answer 5, 6, 7, 8 or 11 in P2 (exclusively the employed conducting own business activity)

- P28 How would you define the sector in which you work (or your company operates)?
(Respondent's card)
- | | |
|--|--|
| <ol style="list-style-type: none"> 1 Agriculture, forestry, hunting and fishing 2 Industry, mining, metallurgy 3 Construction 4 Trade, vehicle repair 5 Transport and storage 6 Accommodation and food service 7 Information and communication 8 Financial and insurance activities 9 Real estate activities 10 Professional, scientific and technical activities 11 Administrative and support service activities 12 Public administration and defence; compulsory social security 13 Education 14 Human health and social work activities 15 Other sector (what?) | <input style="width: 60px; height: 40px; border: 1px solid black;" type="text"/> |
|--|--|

- P29 How long have you been working at the current employer (or running your company)?
- | | | |
|--|---|-------|
| | <input style="width: 100px; height: 30px; border: 1px solid black;" type="text"/> | years |
|--|---|-------|

- P30 Which of the descriptions suit your current job?
- Interviewer: read the cafeteria.**
- | | |
|--|--|
| <ol style="list-style-type: none"> 1 Majority of time I spend in sedentary position (e.g. office work) 2 Majority of time I spend standing or walking, however, my work does not require significant physical effort (e.g. sale assistant, hair-dresser, security worker etc.) 3 I perform work requiring physical effort (physical work requiring lifting heavy objects such as cleaner, sport instructor, nurse, electrician etc.) 4 I perform difficult physical work requiring carrying heavy objects (e.g. miner, construction worker etc.) 5 Other situation, what? | <input style="width: 60px; height: 40px; border: 1px solid black;" type="text"/> |
|--|--|

- P31 Due to your knowledge, qualifications, skills, do you feel fully useful in your workplace?
- Interviewer: read the cafeteria**
- | | |
|--|--|
| <ol style="list-style-type: none"> 1 Definitely yes 2 Rather yes 3 Rather no 4 Definitely no 5 Hard to say (<i>do not read</i>) | <input style="width: 60px; height: 40px; border: 1px solid black;" type="text"/> |
|--|--|

P32 Have you been absent from work within last 12 months due to poor health conditions? 1 Yes
2 No

Go to P34

P33 Have you been absent from work within last 12 months due to poor health conditions?

days

P34 Are you satisfied with your current work with regard to the following aspects:

	Very satisfied	Rather satisfied	Rather dissatisfied	Very dissatisfied	Hard to say	N/A	
Level of remuneration / earned income							
Stability of employment							
Organization and physical working conditions							
Type of performed tasks							
The possibility to combine occupational life with house and family obligations							
Relationship with the superior							
Relationship with co-workers							
Recognition of the superior							
Participation in occupational trainings							

Questions P35 – P41 concern respondents who chose the answer 5, 6, 7, 8, 9 or 11 in P2 (exclusively the employed conducting own business activity or farmers)

P35_0 In your opinion, do you have enough time to take up other economic activity, apart the one in your own farm? 1 Yes, during the whole year
2 Yes, only temporarily
3 No

P35 Do you perform any additional work apart from the work in your basic workplace? 1 Yes
2 No
98 Refusal to answer (do not read)

Go to P37

<p>P36 What kind of work it is? <i>(It is possible to choose more than one answer)</i> Interviewer: read the cafeteria</p>	<ol style="list-style-type: none"> 1 Permanent 2 Seasonal 3 Occasional/ incidental 	<input style="width: 50px; height: 30px; border: 1px solid black;" type="text"/>			
<p>P37 Would you like to retrain and change your profession if there would be such possibility? Interviewer: read the cafeteria</p>	<ol style="list-style-type: none"> 1 Definitely yes 2 Rather yes 3 Rather no 4 Definitely no 97 Hard to say (do not read) 				
<p>P38 Would you like to retire as soon as possible when you are thinking about your current job? Interviewer: read the cafeteria</p>	<ol style="list-style-type: none"> 1 Definitely yes 2 Rather yes 3 Rather no 4 Definitely no 97 Hard to say (do not read) 	<p>Go to P40</p>			
<p>P39 For what reasons?</p>	<input style="width: 385px; height: 30px; border: 1px solid black;" type="text"/>				
<p>P40 Please take a look at the following list of reasons to extend the employment period. Please select three describing your point of view. Which reason is the most important, meaning which would you place as the first? Which as the second and the third? <i>(We ask only about the reasons that the respondent has given i.e. if he/she gave only one reason we do not ask any more questions, if two – we ask about the importance of the two)</i> <i>(Respondent's card)</i></p>	<ol style="list-style-type: none"> 1 Transfer to a post demanding less physical effort 2 Transfer to a less stressful post 3 Transfer to a post demanding less mental effort 4 Decreased number of working hours 5 More comfortable organization of work 6 Flexible working hours 7 Possibility to work at home 8 Higher remuneration 9 Special equipment facilitating the performance of tasks 10 Adjusting working space to the limited possibilities of an older person 11 Other factors (what?) 12 Nothing can persuade me to stay employed 	<table border="1" style="border-collapse: collapse; width: 50px; height: 50px;"> <tr><td style="width: 50px; height: 20px;"></td></tr> <tr><td style="width: 50px; height: 20px;"></td></tr> <tr><td style="width: 50px; height: 20px;"></td></tr> </table>			

**Questions P42 – P45 concern respondents who chose the answer 12 or 13 in P2
(exclusively the unemployed)**

P42	Are you currently registered in the labour office as unemployed?	Yes No	<input type="checkbox"/>
P43	Do you receive unemployment allowance?	Yes No	<input type="checkbox"/>
P44	How long have you been unemployed?	<input type="text"/>	
P45	Have you been looking for a job during last month?	Yes No	<input type="checkbox"/>

**Questions P46 – P547 concern respondents who chose the answer 1, 2, 3, 4, 10, 12, 13, 14 or 15 in P2
(exclusively retired people, pensioners, people not active economically and the unemployed)**

P46	Have you performed any work for consideration in a form of at least one hour or helped without remuneration in your family-run business or a family-run farm within last 7 days?	1 Yes 2 No	<input type="checkbox"/>
P47	What kind of work was it? (it is possible to choose more than one answer)	1 Taking care of children (for consideration) 2 Taking care of a disabled person or an older person (for consideration) 3 Specialist services 4 Office work 5 Physical work (work at farm, cleaning, production worker, security industry etc.) 6 Other (what?)	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Further questions concern all the respondents

P48	Have you been registered in the labour office as unemployed within last 24 months?	1 No 2 Yes	<i>Go to P52</i>	<input type="checkbox"/>
P49	How many times have you been registered as unemployed within last 24 months?	<input type="text"/>		

P50 How long (in total) have you been unemployed within last 24 months?

months

P51 Have you used any of the following forms of economic activation offered by the labour office within last 24 months while unemployed? (it is possible to choose more than one answer) (Respondent's card)

- 1 Employment intermediary services
- 2 Trainings on skills in job searching and activation courses
- 3 Occupational trainings
- 4 Coverage of costs of examinations which allow to acquire occupational qualifications and costs of licences necessary to perform a given profession
- 5 Loan for financing costs of a training
- 6 Financing post-graduate studies
- 7 Intervention works on a part-time basis
- 8 Intervention works on a full-time basis
- 9 Public works
- 10 Works socially useful
- 11 Vocational trainings for adults
- 12 Individual employment programme
- 13 Social contract
- 14 Internship
- 15 Career counselling (including individual action plan) and the use of vocational information
- 16 Subsidy for starting your own business activity (within social cooperative)
- 17 I did not use any of the enumerated forms of economic activation

P51_a Did you take up a job within 3 months after finishing your participation in the above-mentioned forms of economic activation?

- 1 Yes
- 2 No

P51_b Which form of activation did it concern? (Respondent's card)

- 1 Employment intermediary services
- 2 Trainings on skills in job searching and activation courses
- 3 Occupational trainings
- 4 Coverage of costs of examinations which allow to acquire occupational qualifications and costs of licences necessary to perform a given profession

- 5 Loan for financing costs of a training
- 6 Financing post-graduate studies
- 7 Intervention works on a part-time basis
- 8 Intervention works on a full-time basis
- 9 Public works
- 10 Works socially useful
- 11 Vocational trainings for adults
- 12 Individual employment programme
- 13 Social contract
- 14 Internship
- 15 Career counselling (including individual action plan) and the use of vocational information
- 16 Subsidy for starting your own business activity (within social cooperative)
- 17 I did not use any of the enumerated forms of economic activation

P51_c Which of the forms of economic activation mentioned in the question P51 would you consider the most useful to people aged 45+? (Respondent's card)

P51_d In which forms of economic activation mentioned in the question P51 would you like to participate? (Respondent's card)

P51_e Have you used services of an employment agency when searching for a job?

1 Yes

2 No

P52 What is your total job seniority?
Attention: job seniority includes...

years

P53 In how many places have you worked in total?
Attention: by workplace we understand...

1 In your whole life

2 After turning 45

P54 Please evaluate whether the following statements are true in the light of the existent provisions:

	Yes	No	Hard to say	
The employee aged 45/50+ who was given notice due to specific reasons of the employment establishment (e.g. collective lay-offs) can use various special programmes offered by the labour office				
Training costs of an employee aged 45+ threaten by losing a job due to specific reasons of the employment establishment can be refunded by the State to a greater extent than training costs of a younger employee				
Employer employing people aged 45/50+ can be exempt from the obligation of paying Labour Fund contributions				
Employer employing people aged 45/50+ can obtain tax allowances				

P55 I will enumerate several existent rules regarding people aged 45+. Please evaluate each of them saying to what extent it favours the improvement of the opportunities of people aged 45+ in the labour market. Please use the scale: "it definitely favours", "it rather favours", "it rather does not favour", "it definitely does not favour"

	Definitely yes	Rather yes	Rather no	Definitely no	Hard to say	
Shortening the period for which the employer has to pay for the employees' sickness from 33 to 14 days						
4-year period protecting the employee from dismissal before the retirement						
Exempting employers from paying contributions to Labour Fund and Guaranteed Employee Benefits Fund regarding newly employed people aged 50+						
Extension of the employment period for the unemployed 50+ in the area of intervention works to 4 years						
Employment of the unemployed 50+ in the area of public works						
Financing the purchase of equipment for the work station of the unemployed 50+ up to the amount 6 times bigger than the average remuneration						
Providing free trainings for people 50+						
Providing internships for people 50+ during which they are entitled to receive a grant						
Providing vocational trainings for people 50+ during which they are entitled to receive a grant						

Covering costs of examinations and licences for people 50+						
Loans without interest for financing trainings of people aged 50+						
Financing post-graduate studies for people aged 50+						
Limiting entitlements to so called bridging retirement						
Limiting the possibility to combine occupational work with receiving the whole amount of retirement only to the situation when the employment relationship with the current employer was severed.						
Introduction (by the so called Nursery Act) of facilitations regarding the establishment of crèches and children's clubs as well as the co-financing of costs of a baby sitter or a care giver						
Allowing to finance company kindergarten from the social benefits fund						

<p>P56 In what areas and in what way the State could support operations aiming to improve the situation of people aged 45+ in the labour market? (pre-categorized question) Interviewer: read the cafeteria Show the respondent the card with possible answers</p>	1	We need to change the employers' way of thinking about the occupational possibilities of people aged 45+	
	2	We need to introduce more tangible financial encouragement for employers regarding employing people aged 45+	
	3	We need to introduce more tangible financial encouragement for employers in order to include employees aged 45+ into trainings which would enable them to acquire new qualifications or modernize their occupational competences	
	4	We need to persuade employers to create and carry out various social programmes which would allow people aged 45+ after being dismissed due to specific reasons of the employment establishment to find a new job	
	5	We need to equip public employment services with suitable legal instruments since the existing ones are not sufficient	
	6	We need to provide public employment services with larger financial support for people aged 45+ since the existing ones are not sufficient	
	7	We need to prepare public employment services better for the support of the unemployed aged 45+ (particularly 50+) – provide employees with accurate knowledge and qualifications	
	8	We need to provide better care for little children	
	9	We need to promote maintaining employment among people aged 45+	
	10	Other solutions, (what?)	

P57 Have you ever conducted your own business activity or entered into a partnership?	1	Yes			<input style="width: 50px; height: 30px;" type="checkbox"/>	
	2	No				
P58 Have you worked as a volunteer within last 24 months?	1	Yes			<input style="width: 50px; height: 30px;" type="checkbox"/>	
	2	No		<i>Go to P60</i>		
P59 How much time (more or less) do you devote to working as a volunteer per month?			<input style="width: 250px; height: 25px;" type="text"/>			
P60 Have you been employed on a part-time basis after turning 45?	1	Yes			<input style="width: 50px; height: 30px;" type="checkbox"/>	
	2	No		<i>Go to P62</i>		
P61 What were the reasons for it? (it is possible to choose more than one answer) <i>(Respondent's card)</i>	1	Due to health problems				
	2	Because I wanted to take care of children or grandchildren				
	3	Because I wanted to take care of disabled or older member of my family				
	4	Because I was studying (formally or informally)				
	5	Because I could not find a full-time job				
	6	Other reasons (what?)				
P62 How do you assess your skills within the following areas:						
	None	Very low	Rather low	Rather high	Very high	Hard to say
Computer literacy						
Knowledge of at least one foreign language						
Communication skills and team work						
Organizing your own work						
Organizing work of others						
Conflict management						

P63 Proszę ocenić swoje umiejętności w zakresie obsługi komputera

	None	Very low	Rather low	Rather high	Very high	Hard to say	
Searching for information on the internet							
E-mail management							
Creating and saving texts on the disc							
Knowledge of Excel programme							
Creating websites							
Online payments							
Online shopping							

P64 Do you have a driving licence?

- 1 Yes
- 2 Nie

Go to P66

P65 Of what category?

P66 Have you extended your education by entering university, high school, e-learning platform or participating in trainings or courses within last 24 months?

- 1 Yes
- 2 No

Go to P69

P67 What was the form of your education within last 24 months?
(it is possible to choose more than one answer)
(Respondent's card)

- 1 Education at schools for adults (any level of education, including post-secondary school)
- 2 BA, MA programmes and engineering studies
- 3 Post-graduate or PhD studies
- 4 General trainings/courses (psychology-related, B category driving lessons etc.)
- 5 Computer-related trainings/courses
- 6 Language trainings/courses
- 7 Vocational trainings/courses
- 8 E-learning
- 9 Other forms, what?.....

- P68 How did you finance your education within last 24 months? (it is possible to choose more than one answer) *(Respondent's card)*
- 1 Own resources
 - 2 Aid from family and friends
 - 3 Resources from the labour office
 - 4 Resources from the commune/district budget
 - 5 EU resources
 - 6 Employer
 - 7 Other courses, what?

NON-OCCUPATIONALSITUATION OF THE RESPONDENT

- P69 How do you assess your health condition (taking into consideration your age)? **Interviewer: read the criteria**
- 1 Very good *Go to P74*
 - 2 Rather good *Go to P74*
 - 3 Mediocre *Go to P74*
 - 4 Rather bad
 - 5 Very bad
 - 99 Hard to say *(do not read)*

- P70 Does any of the following is connected with your health condition? (it is possible to choose more than one answer) *(Respondent's card)*
- 1 Because of health problems, for 6 months or longer, I have had a limited ability to perform activities which people usually perform
 - 2 I cannot walk independently
 - 3 I walk with great effort
 - 4 I have to take medicines regularly every day
 - 5 I have to receive rehabilitation treatment often and regularly
 - 6 I have to control regularly my health condition during the whole day (pressure taking, glucose tests etc.)
 - 7 Other (what?)

- P71 Do you have a disability degree certificate?
- 1 No *Go to P74*
 - 2 Yes

P72 What degree of disability?

P73 When did you obtain the disability degree certificate?

<p>P74 Have you used the following within last year: (it is possible to choose more than one answer) <i>(Respondent's card)</i> Attention: in case of health resort, please mark: ...</p>	<ol style="list-style-type: none"> 1 Free (financed by National Health Fund – NFZ) public services and non-public health care facilities 2 Chargeable (not financed by NFZ) public services and non-public health care facilities 3 Services of health care facilities which were financed by the employer under prepaid package 4 Services of health care facilities financed by charity/other people 	<table border="1" style="width: 100%; height: 100%;"> <tr><td style="width: 50px; height: 30px;"></td></tr> <tr><td style="width: 50px; height: 30px;"></td></tr> <tr><td style="width: 50px; height: 30px;"></td></tr> <tr><td style="width: 50px; height: 30px;"></td></tr> </table>																												
<p>P75 Do you have obligations related to the care of: Interviewer: read the cafeteria.</p>	<table style="width: 100%;"> <thead> <tr> <th style="width: 5%;"></th> <th style="width: 70%;"></th> <th style="width: 10%; text-align: center;">Yes/ No</th> <th style="width: 15%; text-align: center;">Num- ber of people</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">1</td> <td>Your own children aged up to 15 <i>Go to P77</i></td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> <tr> <td style="text-align: center;">2</td> <td>Your own children aged 16 – 18 <i>Go to P77</i></td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> <tr> <td style="text-align: center;">3</td> <td>Your grandchildren aged up to 7</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> <tr> <td style="text-align: center;">4</td> <td>Your grandchildren aged 8 – 15</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> <tr> <td style="text-align: center;">5</td> <td>Your parents of advanced age or chronically ill</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> <tr> <td style="text-align: center;">6</td> <td>Other disabled people</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> </tbody> </table>			Yes/ No	Num- ber of people	1	Your own children aged up to 15 <i>Go to P77</i>	<input type="checkbox"/>	<input type="checkbox"/>	2	Your own children aged 16 – 18 <i>Go to P77</i>	<input type="checkbox"/>	<input type="checkbox"/>	3	Your grandchildren aged up to 7	<input type="checkbox"/>	<input type="checkbox"/>	4	Your grandchildren aged 8 – 15	<input type="checkbox"/>	<input type="checkbox"/>	5	Your parents of advanced age or chronically ill	<input type="checkbox"/>	<input type="checkbox"/>	6	Other disabled people	<input type="checkbox"/>	<input type="checkbox"/>	
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5	Your parents of advanced age or chronically ill	<input type="checkbox"/>	<input type="checkbox"/>																											
6	Other disabled people	<input type="checkbox"/>	<input type="checkbox"/>																											
<p>P76 How much time do you spend on taking care of these people (please sum up all the hours spent with all the above-mentioned people)? Interviewer: read the cafeteria.</p>	<ol style="list-style-type: none"> 1 More than 6 hours daily 2 From 4 till 6 hours daily 3 From 2 till 4 hours daily 4 Around 2 hours daily 5 More often than 2 times a week but not every day 6 1-2 times a week 7 Irregularly, sporadically 	<table border="1" style="width: 100%; height: 100%;"> <tr><td style="width: 50px; height: 30px;"></td></tr> <tr><td style="width: 50px; height: 30px;"></td></tr> <tr><td style="width: 50px; height: 30px;"></td></tr> <tr><td style="width: 50px; height: 30px;"></td></tr> <tr><td style="width: 50px; height: 30px;"></td></tr> <tr><td style="width: 50px; height: 30px;"></td></tr> <tr><td style="width: 50px; height: 30px;"></td></tr> </table>																												
<p>P77 Do you help members of your family financially? Interviewer: read the cafeteria.</p>	<ol style="list-style-type: none"> 1 No <i>Go to P80</i> 2 Yes, sporadically 3 Yes, quite often 4 Yes, permanently and systematically 	<table border="1" style="width: 100%; height: 100%;"> <tr><td style="width: 50px; height: 30px;"></td></tr> <tr><td style="width: 50px; height: 30px;"></td></tr> <tr><td style="width: 50px; height: 30px;"></td></tr> <tr><td style="width: 50px; height: 30px;"></td></tr> </table>																												
<p>P78 Who do you help?</p>	<div style="border: 1px solid black; height: 30px; width: 100%;"></div>																													
<p>P79 Do those amounts heavily strain your budget?</p>	<ol style="list-style-type: none"> 1 Yes 2 No 	<table border="1" style="width: 100%; height: 100%;"> <tr><td style="width: 50px; height: 30px;"></td></tr> </table>																												

<p>P80 How do you assess financial level of your household? (Respondent's card)</p>	<ol style="list-style-type: none"> 1 We do not have sufficient resources even for modest meals, we have to use external aid 2 We have enough resources to buy food, other expenditures (cloths, shoes, medications) constitute a large problem 3 We have enough resources to satisfy our basic needs but we live modestly 4 We have enough resources to satisfy our basic needs to a moderate degree but we cannot save any money regularly 5 We have enough resources for everything and we are able to save some money regularly 6 We have enough resources for everything and we are able to save considerable amounts of money regularly 97 Hard to say (<i>do not read</i>) 98 Refusal to answer (<i>do not read</i>) 	<input style="width: 100%; height: 100%;" type="text"/>
<p>P81 Is it possible to save money in your household?</p>	<ol style="list-style-type: none"> 1 Yes 2 No 98 Refusal to answer (<i>do not read</i>) 	<input style="width: 100%; height: 100%;" type="text"/>
<p>P82 What is the amount of your savings currently? Interviewer: read the cafeteria.</p>	<ol style="list-style-type: none"> 1 Up to PLN 1.000 2 PLN 1.001 – 5.000 3 PLN 50.01 – 10.000 4 PLN 10.001 – 50.000 5 PLN 50.001 – 100.000 6 More than PLN 100 k 98 Refusal to answer (<i>do not read</i>) 	<input style="width: 100%; height: 100%;" type="text"/>
<p>P83 For what purpose are you saving money?</p>	<input style="width: 100%; height: 100%;" type="text"/>	
<p>P84 Are there any loans or credits to pay in your household?</p>	<ol style="list-style-type: none"> 1 Yes 2 No 98 Refusal to answer (<i>do not read</i>) 	<input style="width: 100%; height: 100%;" type="text"/>
<p>P85 For what purposes did those loans/credits were taken?</p>	<input style="width: 100%; height: 100%;" type="text"/>	

<p>P86 What is the total value of those loans and credits that needs to be still paid by your household?</p> <p>Interviewer: read the cafeteria.</p>	<p>1 Up to PLN 5.000 2 PLN 5.001 – 10.000 3 PLN 10.001 – 50.000 4 PLN 50.001 – 100.000 5 More than PLN 100.000 98 Refusal to answer (<i>do not read</i>)</p>	<input type="checkbox"/>
<p>P87 Does your household receive any external aid?</p>	<p>1 Yes 2 No 98 Refusal to answer (<i>do not read</i>)</p> <p style="text-align: right;"><i>Go to P90</i> <i>Go to P90</i></p>	<input type="checkbox"/>
<p>P88 What is the form of this aim? (it is possible to choose more than one answer) Interviewer: read the cafeteria if needed</p>	<p>1 Financial 2 Material 3 In a form of service 4 Other (what?) 98 Refusal to answer (<i>do not read</i>)</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<p>P89 Who provide the external aid to your household? (it is possible to choose more than one answer) Interviewer: read the cafeteria if needed</p>	<p>1 Parents 2 Children 3 Other members of my family 4 Neighbours, friends 5 Social welfare 6 Other organizations (what?) 98 Refusal to answer (<i>do not read</i>)</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<p>P90 How do you assess the current financial situation of your household in comparison to the situation of 3 years ago? Interviewer: read the cafeteria.</p>	<p>1 It improved significantly 2 It improved slightly 3 It did not change 4 It deteriorated slightly 5 It deteriorated significantly 97 Hard to say (<i>do not read</i>)</p>	<input type="checkbox"/>
<p>P91 What type of changes in the financial situation of your household do you expect in the perspective of next 3 years? Interviewer: read the cafeteria.</p>	<p>1 I believe it will improve significantly 2 I believe it will improve slightly 3 I believe it will not change 4 I believe it will deteriorate slightly 5 I believe it will deteriorate significantly 97 Hard to say (<i>do not read</i>)</p>	<input type="checkbox"/>

SOCIAL ACTIVITY OF THE RESPONDENT

P92	Are you a member of any organization or association?	1 No 2 Yes	Go to P94	<input style="width: 60px; height: 30px;" type="text"/>
P93	To what organizations or associations do you belong?	<input style="width: 300px; height: 25px;" type="text"/>		
P94	Do you belong to any political party?	1 No 2 Yes		<input style="width: 60px; height: 30px;" type="text"/>
P95	Are you engaged in any social activity?	1 Nie 2 Yes	Go to P97	<input style="width: 60px; height: 30px;" type="text"/>
P96	In what type of organizations are you engaged socially? Please indicate each of them. <i>(Respondent's card)</i>	1 Structures of local government 2 Non-governmental organizations 3 Support groups 4 Parish groups 5 Other groups (what?)		<input style="width: 60px; height: 100px;" type="text"/>
P97	Do you participate in any forms of cultural activity? (church choir, folk group of dance and song etc.) ?	1 No 2 Tak	Go to P99	<input style="width: 60px; height: 15px;" type="text"/> <input style="width: 60px; height: 15px;" type="text"/>
P98	Please indicate in which	<input style="width: 300px; height: 25px;" type="text"/>		
P99	Do you participate in courses of the University of the third age?	1 Yes 2 No	Go to P101	<input style="width: 60px; height: 30px;" type="text"/>
P100	How often?	<input style="width: 300px; height: 25px;" type="text"/>		

OPINIONS, VIEWS AND ATTITUDE TOWARDS CHANGES

P101 Do you agree with the following statements?

	Definitely yes	Rather yes	Rather no	Definitely no	Hard to say	
One works mainly for money						
Economic activity is a necessary condition of a successful life						
Economic activity is a necessary condition of self-esteem and social usefulness						
Economic activity enriches your knowledge and develops various abilities						
Economic activity is the most important area of contacts with people						

P102 How do you see your future occupational life?
(Respondent's card)

- 1 My career is ending/ended and I do not think about being economically active again
Go to P106
- 2 I want to be economically active till reaching the retirement age (or acquiring retirement entitlements) but not longer
- 3 I want to be economically active after reaching the retirement age (or after acquiring retirement entitlements) if my health condition will allow for it
- 97 Hard to say (*do not read*)

Go to P106

P103 Which of the following correspond to your way of thinking about your future occupational life?
(Respondent's card)

- 1 I do not intend to extend/broaden my qualifications or retrain
- 2 I accept – if need be – the necessity to slightly extend or broaden my occupational qualifications
- 3 I accept – if need be – the necessity to significantly change my competences (new specialization in the area of my profession)
- 4 I accept – if need be – the necessity of radical retraining (new profession)
- 97 Hard to say (*do not read*)

P104 If you were currently unemployed (or you are unemployed) and you were looking for a job corresponding to your qualifications, how would you assess your chances to find a new job in the nearest neighbourhood?
(Respondent's card)

- 1 I believe that I would find a job very quickly (without a bigger effort)
- 2 I believe that I would have significant difficulties to find a job
- 3 I believe that I would have huge difficulties to find a job
- 4 I believe that I would not find a job
- 97 Hard to say (do not read)

P105 If you were currently unemployed (or you are unemployed) and you could not find a job corresponding to your qualifications in your locality, would you:

- 1 Take up any job just to find employment in your locality or in the nearest neighbourhood?
- 2 Take up a job corresponding to your qualifications in a very distant place in Poland?
- 3 Take up a job corresponding to your qualifications abroad?
- 4 Change the specialization of your profession?
- 5 Change your profession?
- 97 Hard to say (do not read)

P106 Do you agree with the following statements? Please evaluate in the scale from 1 to 7, where 1 means: I definitely do not agree, 2: I do not agree, 3: I rather do not agree, 4: I neither agree nor disagree, 5: I rather agree, 6: I agree, 7: I definitely agree

In many respects, my life is perfect

Conditions of my life are perfect

I am satisfied with my life

I have accomplished the most important aims that I planned in my life

If I could live my life once more time I would not change nearly anything

P107

ATTENTION INTERVIEWER. GIVE THE RESPONDENT THE PSYCHOLOGICAL TEST SWLS TO FILL OUT INDEPENDENTLY

The below scale consists of 19 statements which can describe you or things you like doing. For each, please indicate in what degree it corresponds with your opinion.

(Karta respondentă)

	I definitely do not agree	I do not agree	I agree	I definitely agree	Hard to say	
I try to do my best at work						
I spend much time talking with people						
I would like to be more independent when performing my tasks						

I would be satisfied if I supervised some projects					
I work hard					
I am a sociable person					
I would like to have a job where I organize my schedule on my own					
I would prefer receiving orders to giving any					
It is important to me to do my job the best way possible					
If I have a choice, I prefer working in a group than alone					
I would like to be my own boss					
I aspire to manage others					
I am under my own pressure to become a person who I can be					
I prefer working independently and I allow others to do the same					
I like working in my own pace					
I perceive myself as an organizing person who manage work of others					
I try to improve my work results					
When performing tasks at work, I try to be my own boss					
When I work with people, I try to be a leader					

PARTICULARS OF THE RESPONDENT

<p>M1 Sex</p>	<p>1 Woman 2 Man</p>	<input type="text"/>
<p>M3 What is your level of education? Interviewer: read the cafeteria if need be.</p>	<p>1 Elementary uncompleted 2 Elementary 3 Lower-secondary education 4 Basic vocational education 5 Secondary education 6 Higher vocational education (engineering studies, BA) 7 Higher education</p>	<input type="text"/>
<p>M4 Where do you live?</p>	<p>1 Rural areas 2 Town with less than 20 k of residents 3 City with 20 to 50 k of residents 4 City with 50 to 100 k of residents 5 City with 100 to 500 k of residents 6 City with more than 500 k of residents</p>	<input type="text"/>
<p>M5 What is your net income (take-home pay)? Please take into consideration 3 last months. If you do not know the exact amount, please give an estimated value.</p> <p>Interviewer: explain that it concerns a total (summary) income coming from various sources including: remuneration, civil-law contracts, income from individual business activity and individual farm, retirement pension, disability pension and other benefits)</p>	<p>98 Refusal to answer (<i>do not read</i>)</p>	<p>PLN</p> <input type="text"/>

Instructions for field interviewers conducting CAPI quantitative research among people aged 45+.

Within the nationwide study aiming at drafting the diagnosis of the current situation of women and men aged 50+ on the labour market in Poland.

Context of the research

Current research is conducted at the request of Centrum Rozwoju Zasobów Ludzkich and the University of Łódź. The project is co-financed by the European Social Fund within the framework of Operational Programme Human Capital, Priority 1 "Employment and social inclusion", Operation 1.1 "Systemic support of labour market institutions".

Objective of the research

The objective of the research is to analyse the occupational situation of women and men aged 45-69 and its determinants, however, the research includes already people above 45 years old.

The research component of the project "Equal opportunities in the labour market for people aged 50+" includes the analysis of employment situation of people aged 45+. It results from the necessity to incorporate people approaching the pre-retirement phase of their occupational life into the adaptation process much earlier. That is why the recommendations resulting from the project should refer not only to people aged 50+ but also 45+.

The main aim of the diagnosis is to describe and evaluate the situation of women and men aged 45+ on the Polish labour market, including the evaluation of the role of the institutions supporting the economic activation of people aged 45+.

Detailed objectives: the research of people aged 45+ includes the creation of the profile of a person aged 45+ from the perspective of her/his role and significance in the labour market in the context of demographic and social determinants, particularly:

1. Evaluating the occupational situation of people aged 45+;
2. Comparing the occupational situation and non-occupational situation of people aged 45+ according to the age groups;
3. Identifying the opportunities and barriers with regard to maintaining the employment of people at the pre-retirement age;
4. Evaluating attitudes of women and men at the pre-retirement age with regard to their occupational and social work.

Samples – methodology and sampling

The research will be conducted on the territory of the whole country. Sampling (stratified random sampling) includes residents of Poland aged 45-69.

Sampling is conducted together with a selection in the area of strata established on the basis of age criterion:

1. stratum: 45-49 years (women and men);
2. stratum: 50-59/64 years, i.e. women aged 50-59 and men aged 50-64;
3. stratum: 60/65-69 years, i.e. women aged 60-69 and men aged 65-69.

Total size of the sample: N=3200.

The sample will be selected from the sampling frame of PESEL belonging to Ministry of the Interior.

The actual research is preceded by a pilot testing conducted among 30 people aged 45-69. The table below illustrates basic guidelines of the sample:

Population	Task	Sample size/ number of participants	Manner of sampling	Research technique	Scope of the research
People aged 45-69	Pilot testing	30	purposive	CAPI	any
	Actual study	3200	stratified ran- dom		All-Poland re- presentation

The regional coordinator is responsible for the assignment of the sample – assignment of the individual clusters of addresses on the level of regions.

Research instrument

Questionnaire of CAPI prepared by researchers from the University of Łódź upon consultations with the Performer of the research is the research instrument. The questionnaire consists of the respondent's particulars and 5 sections of questions, both factual questions as well as questions enabling to show opinions and attitudes of respondents.

Basic information on the questionnaire:

1. Total number of questions: 111;
2. Total number of open-ended questions: 7;
3. Because of the criteria that eliminate the possibility to answer some questions by the respondents who do not meet the defined requirements, the number of questions ranges from 44 to 75;
4. Total number of variables ranges from 210 to 256;
5. Total duration time of the interview: around 70-90 minutes.

Description of selected questions:

Question P1

Household – Definition

A group of related or not related people living together and maintaining themselves jointly.

Additional methodological explanation

Households are selected among people living in apartments (without units of collective accommodation). We can single out one-person, multi-member (two people and more), family and non-family households.

Source of definition

- the Act of 2 December 2010 on Polish population and housing census in 2002.

Main source of income means a source that provides the largest part of your “take-home pay”. Income includes: remuneration for work, various kinds of disability pensions, retirement pension, allowances, capital income, donations and other income – also the illegal one.

Question P36

The terms of **seasonal work** and **occasional work** require additional explanation.

Seasonal work – *neither the Labour Code nor the Legislator in any other document define the term of seasonal work. Hence we need to refer to the common meaning of these terms. The term seasonal is defined in the Dictionary of Polish Language as: typical of a season, used in a season, connected with a specific season of the year, seasonal fruit and vegetables; working, active in a season e.g. seasonal workers, employees.*

By connection to a season of the year, we need to understand not only a direct connection to a season of the year, typical of agriculture works, construction works or winter works, but also works connected with the provision of possibilities to perform work by supplying the workers with equipment and suitable working conditions.

To define characteristics of seasonal work, the notion of the season is also crucial. It determines the duration of the employment contract. Specified time of its validity directly results from the properties of given works. Seasonal employment can be defined as employment aiming at the performance of works whose occurrence or intensification have a seasonal character connected directly to the properties of seasons of the year. Such definition of seasonal work illustrates two aspects of this form of employment; on the one hand, one concludes a term agreement for the duration of a season, and on the other hand, one employs a worker for the performance of works which are strictly connected to a season. Hence seasonal work belongs to term agreements applicable in situations when there is a need to replace an absent worker or during periods of intensified activity of an enterprise. (source: www.mfiles.pl)

Occasional work: *Labour Code does not define the notion of occasional work. In the common meaning, occasional work is work for a short period of time and of unrepeatable nature. Occasional work is a type of seasonal work which differs from the seasonal work by the fact that it refers to every kind of work. (source: www.mfiles.pl)*

Tasks and obligations of the Interviewer

1. Interviewers are obliged to get familiar with the research instrument in detail before they start to conduct interviews;
2. Interviewers are obliged to get familiar with the main manual as well as partial instructions included in the research instrument next to individual questions and sections of questions;
3. Interviewers are obliged to comply with all instructions, particularly those which define methodology of interviewing and especially:
 - a. Read the content of the cafeteria where it is recommended, and do not read the cafeteria where it is not;
 - b. Present the respondents with respondent's cards. Every time when instruction says: „Respondent's card” – give the respondent the relevant card and read the cafeteria out loud;
 - c. Present the respondent with the letter informing about the objective and the method of the research (template of the letter in the Attachment no.1);
 - d. Do not reveal to the respondents documents or materials not meant for them, particularly the manual for the Interviewer and the questionnaire: the questionnaire is a tool of the Interviewer; the respondent should not see the notebook screen on which the Interviewer is working. For the respondent's use: respondent's cards and the letter for the respondent.
4. The Interviewer is under obligations resulting from the code of ESOMAR and the Act on personal data protection (The ACT on personal data protection of 29 August 1997) and in particular:
 - a. Under the disclosure obligation, the Interviewer informs about the situation of the research to which the respondent is invited (the respondent has to be aware that he/she takes part on the social research);
 - b. Under the disclosure obligation, the Interviewer informs about the source of the respondent's personal data and the aim of data processing;

- c. The Interviewer informs the respondent at whose request the research is conducted;
- d. The Interviewer protects the respondent's personal data: the Interviewer does not reveal data to third parties, protects the carrier on which personal data are saved. In the case of loss of the data carrier, the interviewer is obliged to inform immediately the police and the representative of the research company i.e. competent regional coordinator or other employee;
- e. The Interviewer conducts the interview upon the consent of the respondent to participate in the research;
- f. The researcher has to take precautions so the researched people are not in any way harmed or affected as a result of their participation in the market research project (source: ESOMAR Code);
- g. The researched have to be able to verify the identity of the researcher and the fact that he/she acts in good faith (source: ESOMAR Code). The interviewer always carries a valid Interviewer's ID;
- h. Interviewer tries to guarantee that the respondent will not incur any personal damage or suffer harm.

SUMMARY OF SELECTED INTERVIEWING TECHNIQUES

1. The respondent answers the questions on his/her own. The interviewer takes care of the interview arrangement, suggests that that the respondent should answer questions without any influence of third parties;
2. The interviewer reads out the content of questions according to the questionnaire and the instruction;
3. The interviewer asks more questions to extend open-ended and half-open-ended questions, e.g. "do you want to add anything else?" or "Please justify your choice." The interviewer gives the respondent sufficient time to think about the question and give an answer;
4. The interviewer does not judge the respondent's answers;
5. The interviewer does not express his/her own opinions concerning any of the areas.

Informative materials for the Respondent

Dear Sirs and Madams,

The Research Institute ARC Rynek i Opinia sp. z o.o. with the registered office in Warsaw in Słowackiego 12 street is currently carrying out a social study under the nationwide study aiming at drafting the diagnosis of the current situation of women and men aged 50+ on the labour market in Poland. The objective of the research is to analyse the occupational situation of women and men aged 45-69 and its determinants.

The current research is conducted at the request of Centrum Rozwoju Zasobów Ludzkich and the University of Łódź. The project is co-financed by the European Social Fund within the framework of Operational Programme Human Capital, Priority I "Employment and social inclusion", Operation 1.1 "Systemic support of labour market institutions".

We kindly request you to take part in the research and give truthful and reliable answers to all the questions.

The survey will be conducted by an Interviewer whose identity can be verified thanks to his/her Interviewer's ID with the logo of the research institute, contact details, name and surname.

We would like to assure you that the research is confidential and anonymous (in compliance with the trade code of ESOMAR and the Act on personal data protection); all the data which will be gathered in the course of the interview will be presented only in the form of collective statistical data (tables, charts) and will not be presented together with contact details and personal data of the respondents. Simultaneously, we inform you that your personal data were selected from the PESEL sampling frame, belonging to Ministry of the Interior and used only in order to perform the research.

Thank you for participating in the research and your cooperation with our Interviewer. We inform you that all contact details (particularly phone numbers) that will be gathered by the Interviewer will be used only in order to verify the Interviewer's reliability.

All the questions and comments please send to: office@arc.com.pl with caption: "Information from a Respondent" or call under: (22) 584 85 00.

Yours faithfully,
Aneta Wójcik
Manager of Filed Research Department
ARC Rynek i Opinia

MODULE 2.
THE QUANTITATIVE RESEARCH OF EMPLOYERS

QUESTIONNAIRE OF THE SURVEY RESEARCH

among

EMPLOYERS

Introduction and interview arrangement

Good Morning. My name is (name and surname of the interviewer). I am an employee of ARC Rynek i Opinia Research Institute located in Warsaw in Słowackiego 12 Street. At the request of Ministry of Labour and Social Policy, the University of Łódź together with Centrum Rozwoju Zasobów Ludzkich execute a research project regarding the provision of equal opportunities for people aged 45 and over on the Polish labour market since they experience more and more difficulties in finding jobs or maintaining their jobs due to their age. Your opinion as an employer will be for us a valuable source of information and will help to prepare a catalogue of operations aiming to promote the economic activation of people aged 45+.

The study is conducted within the project "Equal opportunities in the labour market for people aged 50+", co-financed by the European Social Fund at the request of Centrum Rozwoju Zasobów Ludzkich with the Łódź University.

Your answers will remain anonymous, which means they will be presented exclusively in a form of collective statistical data and will not be revealed to anyone.

I kindly request you to take part in the research.

R1	What is your post?	1	Owner	
		2	Chief Executive Officer or Chairman	
		3	Vice-director or HR manager (or equivalent)	
		4	Other managerial position	
		5	Specialist in HR department (in human resources)	
		6	None of the above (<i>ask for a person meeting the criteria</i>)	

R2	How long have you been working on that post?	<input style="width: 90%; height: 25px;" type="text"/>
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R3	What is your total job seniority?	<input style="width: 90%; height: 25px;" type="text"/>
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R4	What is your job seniority in this company/institution/office?	<input style="width: 90%; height: 25px;" type="text"/>
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In the course of the interview the respondent will be asked questions requiring knowledge on estimated values of the following characteristics:

1. *Total number of the employed as of 31 December 2011*
2. *Total number of the employed aged 45+ as of 31 December 2011*
3. *Number of women aged 45+ employed as of 31 December 2011*
4. *The average age of the employed as of 31 December 2011*
5. *Number of the employed/dismissed in 2011 (including people aged 45+)*
6. *Number of women aged 45+ employed/ dismissed in 2011*

In the case when the respondent is not able to answer these questions, such information should be obtained during a telephone conversation with the respondent (supplementary interview). In the event when the respondent suggests postponing the interview, you should ask the respondent to prepare such data.

EMPLOYMENT STATE																	
P1	Were there people aged 45+ among the employed (on the basis of employment contract or civil-law contract) as of 31 December 2001?	1 Yes 2 No	Go to P9 <input type="checkbox"/> <input type="checkbox"/>														
P2	What was the percentage of people aged 45+ in the total number of the employed as of 31 December 2001?	<input type="text"/>															
P3	What was the percentage of women in the total number of the employed as of 31 December 2001?	<input type="text"/>															
P4	What was the percentage of people aged 50+ in the total number of the employed aged 45+ as of 31 December 2001?	<input type="text"/>															
P5	Were there among employees aged 45+ people employed on the following posts: (It is possible to choose more than one answer. Ask for Yes or No answers with regard to each variant)	1 Unskilled employee 2 Skilled employee/ worker position 3 Specialist (white-collar worker, qualification required) 4 Auxiliary administrative staff (white-collar worker, qualification required) 5 Unskilled employee 6 Other (what?)	<table border="1"> <thead> <tr> <th>Y</th> <th>N</th> </tr> </thead> <tbody> <tr><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr> <tr><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr> <tr><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr> <tr><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr> <tr><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr> <tr><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr> </tbody> </table>	Y	N	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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<p>P6 Please indicate what kind of works the employees aged 45+ perform in your company/institution/office. Do those people occupy the following positions:</p> <p>(It is possible to choose more than one answer. Ask for Yes or No answers with regard to each variant)</p>	<ol style="list-style-type: none"> 1 Specialist requiring occupational experience 2 Managerial and other independent 3 Basic (production, services etc.) with a low physical workload 4 Basic (production, services etc.) with a moderate physical workload 5 Basic (production, services etc.) with a high physical workload 6 Auxiliary administrative 7 Other auxiliary 8 Other works (what?) 	<table border="1"> <thead> <tr> <th>Y</th> <th>N</th> </tr> </thead> <tbody> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> </tbody> </table>	Y	N																
Y	N																			
<p>P7 What kind of contract was concluded with workers aged 45+ employed as of 31 December 2011? Were the following contracts concluded with those people:</p> <p>(It is possible to choose more than one answer. Ask for Yes or No answers with regard to each variant)</p>	<ol style="list-style-type: none"> 1 contract for specified period of time 2 contract for unspecified period of time 3 contract for the period of performing a given task 4 civil-law contract 5 agreement with DLO regarding internship or other supported employment 6 agreement with Temporary Work Agency 	<table border="1"> <thead> <tr> <th>Y</th> <th>N</th> </tr> </thead> <tbody> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> </tbody> </table>	Y	N																
Y	N																			
<p>P8 On what time basis people aged 45+ work in your institution/company/office? Do they work on the following basis:</p> <p><i>(It is possible to choose more than one answer. Ask for Yes or No answers with regard to each variant)</i></p>	<ol style="list-style-type: none"> 1 Full-time basis 2 Part-time basis 3 Task-based working time 	<table border="1"> <thead> <tr> <th>Y</th> <th>N</th> </tr> </thead> <tbody> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> </tbody> </table>	Y	N																
Y	N																			
<p>P9 Have you employed people who already acquired retirement entitlements or retired within last 5 years?</p>	<ol style="list-style-type: none"> 1 Yes 2 No <p style="text-align: right;"><i>Go to P13</i></p>	<table border="1"> <tbody> <tr><td></td></tr> <tr><td></td></tr> </tbody> </table>																		
<p>P10 Please indicate which group did it concern?</p>	<ol style="list-style-type: none"> 1 Mainly women 2 Mainly men 3 Women and men in the same extent 	<table border="1"> <tbody> <tr><td></td></tr> <tr><td></td></tr> <tr><td></td></tr> </tbody> </table>																		

<p>P11 Please indicate what kind of works the employees who acquired retirement entitlements or retired perform/performed in your company/institution/office. Do those people perform the following works:</p> <p><i>(It is possible to choose more than one answer. Ask for Yes or No answers with regard to each variant)</i></p>	<ol style="list-style-type: none"> 1 Specialist requiring occupational experience 2 Managerial and other independent 3 Basic (production, services etc.) with a low physical workload 4 Basic (production, services etc.) with a moderate physical workload 5 Basic (production, services etc.) with a high physical workload 6 Auaary administrative 7 Other works (what?) 	<table border="1"> <thead> <tr> <th>Y</th> <th>N</th> </tr> </thead> <tbody> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> </tbody> </table>	Y	N														
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<p>P12 What is/was the legal form of employment of people who acquired retirement entitlements or retired? Are they employed on the basis of:</p> <p><i>(It is possible to choose more than one answer. Ask for Yes or No answers with regard to each variant)</i></p>	<ol style="list-style-type: none"> 1 service contract 2 contract for specific work 3 employment contract but on a part-time basis 4 employment contract on a full-time basis 5 Other forms of employment (what?) 	<table border="1"> <thead> <tr> <th>Y</th> <th>N</th> </tr> </thead> <tbody> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> </tbody> </table>	Y	N														
Y	N																	
<p>P13 In your opinion, if people aged 45+ were dismissed from your institution/company/office would they find a similar job on the local labour market? <i>(It is possible to choose more than one answer.)</i></p>	<ol style="list-style-type: none"> 1 Definitely yes 2 It depends on the resourcefulness of the employee 3 It depends on the competences of the employee 4 It depends on the profession of the employee 5 Definitely no 6 I do not know <i>(do not read)</i> 	<table border="1"> <thead> <tr> <th>Y</th> <th>N</th> </tr> </thead> <tbody> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> </tbody> </table>	Y	N														
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<p>P14 We will present you several opinions concerning women and men at the pre-retirement age. Please tell us whether you agree or disagree with them. (option: "I do not know, hard to say" is available in the questionnaire but not suggested by the Interviewer) <i>A: first, we read out all the opinions for women and afterwards for men.</i></p>	<ol style="list-style-type: none"> 1 Women (men - analogically) at the pre-retirement age, which includes 4-year protective period resulting from the Labour Code, want to finish their economic activity as soon as possible 2 Women (men - analogically) are preparing for the retirement but they are also thinking about gainful employment on a part-time basis which they can perform as retirees 3 Women (men - analogically) reluctantly think about the retirement 	<table border="1"> <thead> <tr> <th>W</th> <th>M</th> </tr> </thead> <tbody> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> </tbody> </table>	W	M														
W	M																	

	4	Women (men - analogically) overuse sick leaves	<input type="checkbox"/>
	5	Women (men - analogically) deteriorate their working results because you cannot dismiss them	<input type="checkbox"/>
	6	Women (men - analogically) work as efficiently as before	<input type="checkbox"/>

P15	Does protective period influence your decision concerning the employment of this category of people?	1	It influences, we maintain such workers employed	<input type="checkbox"/>
		2	It influences, we avoid employing people at the pre-retirement age	<input type="checkbox"/>
		3	It does not influence since we do not have such people employed on an employment contract for unspecified period of time	<input type="checkbox"/>

P16	How often have you encountered such situation when employing or cooperating with people aged 45+, using the scale: 0 – never, 1 – very rarely, 2 – rarely, 3 – often, 4 – very often, 5 – always	1	Natural decrease in physical fitness at posts requiring it	<input type="checkbox"/>
		2	Limited possibilities to transfer employees to other tasks	<input type="checkbox"/>
		3	Limited possibilities to introduce other work organization in order to help in more difficult tasks by using the assistance of a younger worker	<input type="checkbox"/>
		4	Maladjustment to the culture of our organization	<input type="checkbox"/>
		5	Occupational burn-out	<input type="checkbox"/>
		6	Reluctance of workers 45+ to participate in trainings	<input type="checkbox"/>
		7	No feeling of competition causing worse results in comparison to younger employees	<input type="checkbox"/>
		8	Lack of suitable qualifications of people aged 45+	<input type="checkbox"/>
		9	Reluctance of younger employees to cooperate with the older (they do not fit in "their" atmosphere of youth)	<input type="checkbox"/>
		10	The possibility of perceiving the company as "old" and not dynamic, not modern etc.	<input type="checkbox"/>
		11	Other difficulties (what?)	<input type="checkbox"/>

Interviewer: In the event when the Respondent has not encountered such obstacles in the course of his whole occupational life, please write down "0".

PERSONAL POLICY

P17	Please indicate which of the following statements describe your company/institution/office in the best manner.	1	Material resources are our priority (own land and buildings, machinery and installations etc.)	<input type="checkbox"/>
		2	Non-material resources are our priority (expertise of our employees, know-how etc.)	<input type="checkbox"/>
		3	Other priorities (what?)	<input type="checkbox"/>

<p>P18 Do you apply the following in your institution/company/office:</p> <p>(It is possible to choose more than one answer. Ask for Yes or No answers with regard to each variant)</p>	1	Recruitment planning taking into consideration age of workers		
	2	Selection of employment forms taking into consideration age of workers		
	3	Organization of working time taking into consideration age of workers		
	4	Remuneration for competences		
	5	Remuneration for individual results		
	6	Selection of tasks which allows for the exchange of experience among employees at various age		
	7	Carrier management which allows for the exchange of experience among employees at various age		
	8	Training methods which consist of the exchange of experience e.g. mentoring, coaching		
	9	Working in teams diversified by age		
	10	Knowledge management		
	11	Promotions based on seniority		
	12	Internship allowances supplementing remuneration		
	13	We do not pay attention to age – results are the most important		

<p>P19 Do you apply any of the following methods in order to retain knowledge connected with the retirement of employees in your institution/company/office?</p> <p>(It is possible to choose more than one answer. Ask for Yes or No answers with regard to each variant)</p>	1	Division of tasks which allows for mutual replacement of employees, meaning doubling of competences		
	2	Documenting fulfilled tasks which allows to replace retiring person by other employee if needed		
	3	Relay system – recruitment of a new employee before the retirement of an older employee		
	4	Preparing successors for crucial posts		
	5	Maintaining contact with retirees with great expertise		
	6	Employing retirees if needed		

<p>P20 Have there been any trainings in the following areas conducted in your institution/ company/ office within last 5 years:</p> <p>(It is possible to choose more than one answer. Ask for Yes or No answers with regard to each variant)</p>	<ol style="list-style-type: none"> 1 Diversity management 2 Age management 3 Corporate social responsibility 4 Work-life balance 	<table border="1"> <thead> <tr> <th>Y</th> <th>N</th> </tr> </thead> <tbody> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> </tbody> </table>	Y	N										
Y	N													
<p>P21 Have your institution/ company/ office taken part in any programme co-financed by EU funds which regarded people aged 45+ (both in last financial perspective 2004-2006 and in the current one 2007-2013)?</p>	<ol style="list-style-type: none"> 1 Yes 2 No 	<p style="text-align: right;"><i>Go to P24</i></p> <table border="1"> <tr><td></td></tr> <tr><td></td></tr> </table>												
<p>P22 What did this programme concern?</p>	<table border="1" style="width: 100%; height: 40px;"> <tr><td></td></tr> </table>													
<p>P23 What was the nature of the participation of your institution/ company/ office?</p> <p>(It is possible to choose more than one answer. Ask for Yes or No answers with regard to each variant)</p>	<ol style="list-style-type: none"> 1 We carried out a programme (project) prepared for the needs of our employees 2 We carried out an open programme (project) aimed at widely defined target group in which our employees rather did not participate as beneficiaries 3 We directed employees of our institution/ company/ office to take part in an open (nationwide) project 4 We are an intermediary institution for local/regional/national programmes 5 Other (what?) 	<table border="1"> <thead> <tr> <th>T</th> <th>N</th> </tr> </thead> <tbody> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> </tbody> </table>	T	N										
T	N													
<p>P24 Do you have any bonuses connected with the improvement in health of an employee in the offer of your institution/ company/ office?</p>	<ol style="list-style-type: none"> 1 Yes 2 No 	<p style="text-align: right;"><i>Go to P26</i></p> <table border="1"> <tr><td></td></tr> <tr><td></td></tr> </table>												
<p>P25 What kind of bonuses?</p> <p><i>(Pre-categorized question)</i></p>	<ol style="list-style-type: none"> 1 Additional health insurance 2 Preventive or other vaccinations 3 Swimming pool pass 4 Gym/fitness club pass 5 Other (what?) 	<table border="1"> <tr><td></td></tr> <tr><td></td></tr> <tr><td></td></tr> <tr><td></td></tr> <tr><td></td></tr> </table>												

P26 Do people aged 45+ are interested in trainings in your institution/company/office?	1	Yes, more than other employees	<input type="text"/>
	2	Yes, the same as other employees	<input type="text"/>
	3	Yes, but with some reservations	<input type="text"/>
	4	Yes, but only as instructors, coaches.	<input type="text"/>
	5	No, neither as instructors nor as trainees	<input type="text"/>
	6	We do not organize trainings apart from the compulsory ones like OHS training	<input type="text"/>

P27 DP: omit P27 and P28 if P1 = 2, Have you cooperated with company organizations of trade unions on issues connected with work, dismissal and recruitment of people aged 45+?	1	No, there are no trade unions in our institution/company/office Go to P29	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
	2	No, since trade unions did not take such initiative Go to P29	
	3	Yes, we started such cooperation	
	4	We have not recruited, employed or dismissed people aged 45+ Go to P29	

Go to P29

P28 What this cooperation concern?	<input style="width: 300px; height: 20px;" type="text"/>
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ORGANIZATION OF WORK AND WORKING TIME

This section of questions is asked only if the respondent indicated that he/she employs people aged 45+ (chose „Yes“ in P1 or P9)

P29 How employees aged 45+ work in your institution/company/office?	1	Rather in teams/departments homogenous in terms of age	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
	2	Rather in teams/departments diversified in terms of age	
	3	Differently – both situations take place	
	4	Usually they occupy independent posts	

P30 How people aged 45+ prefer to work in your institution/company/office?	1	in teams/departments homogenous in terms of age	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
	2	in teams/departments diversified in terms of age	
	3	Does not matter to them	
	4	Hard to say (<i>do not read</i>)	

<p>P31 Please indicate 3 the most important factors that you take into consideration when assigning employees to given tasks.</p>	<ol style="list-style-type: none"> 1 Age of employees 2 Type of qualifications regardless of age 3 Preferences of employees 4 Difficulty of tasks, requirements of various posts 5 Efficiency (performance) of a given employee 6 Experience in similar work 7 Other (what?) 	<table border="1"> <thead> <tr> <th>Y</th> <th>N</th> </tr> </thead> <tbody> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> </tbody> </table>	Y	N																						
Y	N																									
<p>Interviewer: read the cafeteria Now please tell us which of the three would you place as first, which as second and which as third. (<i>ask the respondent to prioritize the answers</i>) Interviewer: read the cafeteria</p>																										
<p>P32 Do the employees aged 45+ of your institution/company/office use in their work the following:</p>	<ol style="list-style-type: none"> 1 Computer 2 Mobile phone 3 Company car (driving) 	<table border="1"> <thead> <tr> <th>Y</th> <th>N</th> </tr> </thead> <tbody> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> </tbody> </table>	Y	N																						
Y	N																									
<p>(It is possible to choose more than one answer. Ask for Yes or No answers with regard to each variant)</p>																										
<p>P33 Do the employees aged 45+ of your institution/company/office work:</p>	<ol style="list-style-type: none"> 1 On the basis of one-shift system 2 On the basis of two-shift system 3 On the basis of three-shift system 4 At night 5 On Saturdays, Sundays and holidays 6 On the basis of individual working schedules 7 In field 8 Overtime 9 As security guards 10 Teleworkers 	<table border="1"> <thead> <tr> <th>Y</th> <th>N</th> </tr> </thead> <tbody> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> </tbody> </table>	Y	N																						
Y	N																									
<p>(It is possible to choose more than one answer. Ask for Yes or No answers with regard to each variant)</p>																										
<p>P34 If there is a need to work overtime, are people aged 45+ taken into consideration?</p>	<ol style="list-style-type: none"> 1 Yes, as first ones 2 To the same extent as other employees 3 As last ones 4 We do not work overtime 																									

P35	What group of employees is prioritized when planning annual leaves?	<ol style="list-style-type: none"> 1 Women with little children 2 Men with little children 3 People with disabilities 4 People aged 45-55 5 People aged 55 and over 6 Other methods of planning annual leaves (what?) 7 Everyone is treated equally 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
MOVEMENT OF THE EMPLOYEES			
P36	Czy w 2011r. przyjęto do pracy nowych pracowników z zewnątrz?	<ol style="list-style-type: none"> 1 Yes 2 No 	Go to P43
		<input type="checkbox"/>	
P37	Czy wśród przyjętych do pracy w 2011 r. były osoby w wieku 45+?	<ol style="list-style-type: none"> 1 Yes 2 No 	Go to P42
		<input type="checkbox"/>	
P38	What was the percentage of women in total number of newly employed people aged 45+?	<input style="width: 100%; height: 30px;" type="text"/>	
P39	<p>Czy w 2011 r. przyjęto do pracy nowych pracowników w wieku 45+: <i>(Możliwy wybór więcej niż jednej odpowiedzi.</i></p> <p><i>Poprosić o odpowiedź tak lub nie w stosunku do każdego z wariantów)</i></p>	<ol style="list-style-type: none"> 1 In the area of intervention works 2 In the area of public works 3 For an internship 4 On the basis of vocational trainings for adults 5 On the basis of other forms of subsidiary employment 6 From a temporary work agency 7 From open market 9 Other (what?) 	
P40	<p>What kind of contract was concluded with workers aged 45+? Was it: (It is possible to choose more than one answer. Ask for Yes or No answers with regard to each variant)</p>	<ol style="list-style-type: none"> 1 contract for specified period of time 2 contract for unspecified period of time 3 contract for the period of performing a given task 4 civil-law contract 5 agreement with DLO regarding internship or other supported employment 6 agreement with Temporary Work Agency 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

<p>P41 On what time basis people aged 45+ work in your institution/company/office? Do they work on the following basis: (It is possible to choose more than one answer. Ask for Yes or No answers with regard to each variant)</p>	<ol style="list-style-type: none"> 1 Full-time basis 2 Part-time basis 3 Task-based working time 	<p>Go to P43</p>	<table border="1"> <thead> <tr> <th>Y</th> <th>N</th> </tr> </thead> <tbody> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> </tbody> </table>	Y	N										
Y	N														
<p>P42 Why on the basis of the recruitment process you did not employ any people aged 45+? (It is possible to choose more than one answer. Ask for Yes or No answers with regard to each variant)</p>	<ol style="list-style-type: none"> 1 Nobody at this age apply for the job 2 There were some applicants but they did not meet the preliminary requirements 3 There were some applicants but in the course of the selection procedure they did not receive positive marks 4 There were some applicants but their financial expectations were too high 5 Other (what?) 		<table border="1"> <thead> <tr> <th>Y</th> <th>N</th> </tr> </thead> <tbody> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> </tbody> </table>	Y	N										
Y	N														
<p>P43 Do you cooperate with people aged 45+ who conduct their own business activity?</p>	<ol style="list-style-type: none"> 1 Yes 2 No 		<table border="1"> <tbody> <tr><td> </td></tr> <tr><td> </td></tr> </tbody> </table>												
<p>P44 Were there any dismissals initiated on the employer's initiative last year in your institution/company/office?</p>	<ol style="list-style-type: none"> 1 Yes 2 No 	<p>Go to P50</p>	<table border="1"> <tbody> <tr><td> </td></tr> </tbody> </table>												
<p>P45 Were there any people aged 45+ among dismissed workers?</p>	<ol style="list-style-type: none"> 1 Yes 2 No 	<p>Go to P50</p>	<table border="1"> <tbody> <tr><td> </td></tr> </tbody> </table>												
<p>P46 Were there any people aged 50+ among dismissed workers who (It is possible to choose more than one answer. Ask for Yes or No answers with regard to each variant)</p>	<ol style="list-style-type: none"> 1 Retired or left on the basis of disability pension 2 Left for other companies because of the restructuring programme 3 Handed in their notices 4 There were no people aged 50+ among the dismissed 		<table border="1"> <thead> <tr> <th>Y</th> <th>N</th> </tr> </thead> <tbody> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> </tbody> </table>	Y	N										
Y	N														

<p>P47 What criteria do you take into consideration when there is a need of downsizing?</p> <p><i>(ask the respondent to put in order 3 factors from the most to the least important; 1 means the most important criterion)</i></p>	<ol style="list-style-type: none"> 1 We reduce working hours of some employees 2 We apply the rule "the last to be employed, the first to be dismissed" 3 The offer concerns people with the right to retire 4 We reorganize work and downsizing concerns the eliminated posts 5 We dismiss the least useful taking into consideration work results 6 Other (what?) 	<table border="1"> <thead> <tr> <th>Y</th> <th>N</th> </tr> </thead> <tbody> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> </tbody> </table>	Y	N												
Y	N															
<p>P48 Were people aged 45+, dismissed on the employer's initiative, offered any help</p> <p><i>(under the programme of outplacement)?</i></p>	<ol style="list-style-type: none"> 1 Yes 2 No <p style="text-align: right;"><i>Go to P50</i></p>	<table border="1"> <tbody> <tr><td></td></tr> <tr><td></td></tr> </tbody> </table>														
<p>P49 What kind of support was offered to dismissed people aged 45+?</p> <p><i>(It is possible to choose more than one answer. Ask for Yes or No answers with regard to each variant)</i></p>	<ol style="list-style-type: none"> 1 Trainings 2 Job agency 3 Career counselling 4 Assistance in active job searching 5 Severance pay 6 Other (what?) 	<table border="1"> <thead> <tr> <th>Y</th> <th>N</th> </tr> </thead> <tbody> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> <tr><td></td><td></td></tr> </tbody> </table>	Y	N												
Y	N															
<p>P50 DP: omit P50, P51, P52 if P9 = 2</p> <p>Have you offered any person at the pre-retirement age to work longer within last 36 months?</p>	<ol style="list-style-type: none"> 1 Yes 2 No <p style="text-align: right;"><i>ask question 51 and omit no. 52</i></p> <p style="text-align: right;"><i>go to no. 52</i></p>	<table border="1"> <tbody> <tr><td></td></tr> </tbody> </table>														
<p>P51 <i>What were the reasons?</i></p> <p><i>(Pre-categorized question)</i></p>	<ol style="list-style-type: none"> 1 Unique qualifications of the worker 2 No possibilities to replace him/her with any worker with similar assets 3 Loyalty towards long-standing employee 4 The employee wanted to work longer 5 The employee was available and flexible 6 The employee could teach other employees 7 Other (what?) 	<table border="1"> <tbody> <tr><td></td></tr> <tr><td></td></tr> <tr><td></td></tr> <tr><td></td></tr> <tr><td></td></tr> <tr><td></td></tr> <tr><td></td></tr> </tbody> </table>														

<p>P52 What were the reasons for it? <i>(Pre-categorized question)</i></p>	<ol style="list-style-type: none"> 1 The company policy according to which the retirement age does not mean the end of employment 2 It is widely known that everyone wants to retire whenever he/she acquires the right to retire 3 We focus on young teams and we systematically rejuvenate the staff members 4 We are an innovative company and older workers do not fit into our image 5 Older workers are less efficient 6 Older workers are often ill 7 We reduce the number of the employed (elimination/compression of jobs) 8 Other (what?) 	<table border="1" style="width: 100%; height: 100%; border-collapse: collapse;"> <tr><td style="height: 25px;"></td></tr> <tr><td style="height: 25px;"></td></tr> <tr><td style="height: 25px;"></td></tr> <tr><td style="height: 25px;"></td></tr> <tr><td style="height: 25px;"></td></tr> <tr><td style="height: 25px;"></td></tr> <tr><td style="height: 25px;"></td></tr> <tr><td style="height: 25px;"></td></tr> </table>								
<p>P53 Have financial changes introduced as of 1 July 2009 regarding exemption from paying contributions to Labour Fund and Guaranteed Employee Benefits Fund for newly employed people aged 50+ influenced your decisions concerning the employment of people aged 50+?</p>	<ol style="list-style-type: none"> 1 Yes, we employed additional workers aged 50+ 2 No, these changes did not influence our decisions <i>Go to P56</i> 	<table border="1" style="width: 100%; height: 100%; border-collapse: collapse;"> <tr><td style="height: 25px;"></td></tr> <tr><td style="height: 25px;"></td></tr> </table>								
<p>P54 Have financial changes introduced as of 1 July 2009 regarding additional exemptions from paying these contributions for workers who turned 55 (women) and 60 (men) influence your decisions concerning the employment of people aged 50+?</p>	<ol style="list-style-type: none"> 1 Yes, we decided against dismissals 2 Yes, we decided to employ new workers at this age 3 No, these changes did not influence our decisions <i>Go to P56</i> 	<table border="1" style="width: 100%; height: 100%; border-collapse: collapse;"> <tr><td style="height: 25px;"></td></tr> <tr><td style="height: 25px;"></td></tr> <tr><td style="height: 25px;"></td></tr> </table>								
<p>P55 Has the allowance (of 1 February 2009) shortening the period for which the employer has to pay for the employees' sickness from 33 to 14 days regarding people aged 50+ positively influence your decisions to:</p>	<ol style="list-style-type: none"> 1 Keep people aged 50+ employed <i>Go to P57</i> 2 Employ new workers aged 50+ <i>Go to P57</i> 3 No, these changes did not influence our decisions 	<table border="1" style="width: 100%; height: 100%; border-collapse: collapse;"> <tr><td style="height: 25px;"></td></tr> <tr><td style="height: 25px;"></td></tr> <tr><td style="height: 25px;"></td></tr> </table>								

P56 Why the above-mentioned facilitations did not influence your decisions to employ people aged 50+? <i>(Pre-categorized question)</i>	<ol style="list-style-type: none"> 1 We did not plan to employ more people 2 It is an insignificant encouragement 3 Disadvantages connected with the employment of people aged 50+ outweigh the advantages 4 Other (what?) 	
OTHER		
P57 Please indicate the three most important changes that in your opinion would encourage people who acquired retirement or pre-retirement entitlements to return to work. Now please tell us which of the three would you place as first, which as second and which as third. <i>(ask the respondent to prioritize the answers)</i>	<ol style="list-style-type: none"> 1 Job less demanding physically 2 Less stressful job 3 Job less demanding mentally 4 Decreased number of working hours 5 More comfortable organization of work 6 Flexible working hours 7 Possibility to work at home 8 Special equipment facilitating the performance of tasks 9 Adjusting working space to the limited possibilities of an older person 10 Other (what?) 11 If an employee has the right to retire nothing can persuade him/her to stay in employment 	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
P58 Would you, as a person responsible for the employment of workers, be willing to introduce such changes in order to employ people at this age?	<ol style="list-style-type: none"> 1 Definitely yes 2 Yes, but not all of them 3 Yes, but subject to other conditions e.g. additional funding from labour office 4 No 5 We use such practices 	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
P59 Are there any chances, in your opinion, for the increase in the employment of people aged 45+ in Poland?	<ol style="list-style-type: none"> 1 Yes 2 No 3 Hard to say 	<input type="text"/> <input type="text"/>
P60 <i>What, in your opinion, could increase the number of employed people aged 45+?</i> <i>(Pre-categorized question)</i>	<ol style="list-style-type: none"> 1 Levelling the retirement age for men and women 2 Increasing the retirement age for men and women 3 Better economic situation in Poland 4 Earmarking larger amounts for supporting the employment of people aged 45+ 5 Better qualifications of people aged 45+ 6 Other factors (what?) 	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

P61 What are, in your opinion, the reasons for the lack of possibilities to increase the employment of people aged 45+?

(Pre-categorized question)

- 1 Lack of job offers and younger people are stronger
- 2 One gets job mainly thanks to one's contacts
- 3 People aged 45+ have obsolete qualifications
- 4 People aged 45+ are not suitable for work since they have health problems
- 5 Too small support of the State
- 6 People aged 45+ are discriminated against in the labour market
- 7 Other reasons (what?)

P62 What is, in your opinion, the age upon reaching which an employee should retire since results of his/her work cease to be sufficient due to his/her age?

(Pre-categorized question)

1	men		years
2	women		years
3	I am not able to define such age since age is not the only factor, it depends on the occupied post, a given person, the type of work etc.		
4	It is not about the results but about the fact that at some age (what age?) people deserve to have a rest		
5	Other (what?)		

PARTICULARS OF THE RESPONDENT

M1 How many employees employ your company/institute/office?

- 1 Up to 9 people
- 2 From 10 to 49 people
- 3 From 50 to 249 people
- 4 From 250 to 999 people
- 5 1 k or more people

M2 What is an average age of employees in your company/institute/office?

--

M3 What is the proprietorship form of your company/institute/office? (in case of partnership – the predominant capital)

- 1 Public – property of the State Treasury
- 2 Public – property of state legal people
- 3 Public – property of the unities of the local government
- 4 Private of legal people – Polish capital
- 5 Private of natural people - Polish capital
- 6 Private of natural or legal people with the share of foreign capital
- 7 Private foreign – of natural or legal people with the registered office abroad

M4 What is the sector of business activity of your company/institute/office?
(Pre-categorized question)

- 1 Agriculture, forestry, hunting and fishing
- 2 Industry, mining, metallurgy
- 3 Construction
- 4 Trade, vehicle repair
- 5 Transport and storage
- 6 Accommodation and food service
- 7 Information and communication
- 8 Financial and insurance activities
- 9 Real estate activities
- 10 Professional, scientific and technical activities
- 11 Administrative and support service activities
- 12 Public administration and defence; compulsory social security
- 13 Education
- 14 Human health and social work activities
- 15 Other sector (what?)

Instructions for field interviewers conducting CATI quantitative research among employers

Within the nationwide study aiming at drafting the diagnosis of the current situation of women and men aged 50+ on the labour market in Poland.

Context of the research

Current research is conducted at the request of Centrum Rozwoju Zasobów Ludzkich and the University of Łódź. The project is co-financed by the European Social Fund within the framework of Operational Programme Human Capital, Priority I "Employment and social inclusion", Operation 1.1 "Systemic support of labour market institutions".

Objective of the research

The objective of the research is to analyse the occupational situation of women and men aged 45-69 and its determinants; however, the research includes already people above 45 years old.

The aim of the CATI research among employers is to analyse the current state and attitudes of employers with regard to the employment of people aged 45+. The research concerns employment continued by own employees and the newly employed, taking into consideration employment on the basis of employment contracts and civil-law contracts.

The main aim of the *Diagnosis* is to describe and evaluate the situation of women and men aged 45+ on the Polish labour market, including the evaluation of the role of the institutions supporting the economic activation of people aged 45+.

Detailed objectives:

1. Analysing the scale of the employment of people aged 45+ and their location in the structure of an organization;
2. Analysing the applied forms of employment of people aged 45+;
3. Analysing the movement of employees, taking into consideration people aged 45+;
4. Analysing working conditions and possibilities of their modification in the group of people aged 45+;
5. Evaluating the interest of employers in the aspect of human resources management, taking into consideration the older age of the employees;
6. The attitude of employers towards trainings financed/ co-financed by employers; the participation of employees aged 45+ in such trainings;
7. Identifying instruments stimulating people aged 45+ to be more active economically;
8. Evaluating the existing legislative solutions from the perspective of the provision of equal opportunities for people aged 45+.

Sampling

The research concerns employers whose registered office is located in Poland, employing at least one employee. Among employers, we can single out:

1. Enterprises i.e. entities conducting business activity regardless of their legal form (pursuant to the regulation EC 800/2008, OJ EU no. L 214 of 9 August 2008);
2. Public institutions (entities) i.e. bodies of governmental administration, state audit bodies and law enforcement bodies, courts and tribunals, units of local governments and their associations, institutions of budgetary economy, state target funds, Social Insurance Institution and its funds as well as Agricultural Social Insurance Institution and funds managed by the Chairman of Agricultural Social Insurance Institution, National

Health Fund, autonomous state health care centres, public universities, The Polish Academy of Science and its organizational units, state and local legal people established on the basis of separate acts in order to carry out public operations (pursuant to the Act on public finance of 27 August 2009 (Dz. U. 2009, no. 157, item 1240, article 9);

3. Non-profit organizations are the organizations operating in the area related to the provision of services which because of their unprofitability are not provided by the sector of enterprises (the private sector) and are not offered or are offered in an insufficient degree by public institutions.

Basic guidelines for the sample structure and methodology of sampling:

1. The research will be conducted on the territory of the whole country by means of computer-assisted telephone interviewing carried out on a nationwide representative sample of employers, with the selection within strata determined on the basis of the criteria of scale of employment and proprietorship form;
2. Planned size of the sample, N=1000 subjects;
3. Manner of sampling: stratified random;
4. Strata criteria: the scale of employment (to 9 workers, 10-49 workers, 50-249 workers, 250 workers or more) and the proprietorship form (public/ non-public);
5. Respondents will be: owners of companies, people occupying managerial positions (chairman, vice-chairman, executive officer, HR manager) who have practical experience in HR management and sufficient knowledge of labour law regulations and other aspects connected with the labour market;
6. The actual study will be preceded by a pilot testing conducted among 30 employers.

The table below presents basic guidelines of sampling:

Population	Task	Sample size/ number of participants	Manner of sampling	Research technique	Scope of the research
Employers	Pilot testing	30	purposive	CATI	any
	Actual study	1000	stratified random		All-Poland re- presentation

Research instrument

The CATI questionnaire consists of the respondent's particulars and 5 sections of questions, both factual questions as well as questions enabling to show opinions and attitudes of respondents.

Basic information on the questionnaire:

1. Total number of questions: 62;
2. Total number of open-ended questions: 2;
3. Because of the criteria that eliminate the possibility to answer some questions by the respondents who do not meet the defined requirements, the number of questions ranges from 19 to 70;
4. Total number of variables ranges from 111 to 252;
5. Total duration time of the interview: around 45-60 minutes.

Description of selected questions:

The description of selected questions can occur as a result of the pilot testing which will indicate which questions require additional instructions for the Interviewer.

Tasks and obligations of the Interviewer

1. Interviewers are obliged to get familiar with the research instrument in detail before they start to conduct interviews;
2. Interviewers are obliged to get familiar with the main manual as well as partial instructions included in the research instrument next to individual questions and sections of questions;
3. Interviewers are obliged to comply with all instructions, particularly those which define methodology of interviewing ,including: Read the content of the cafeteria where it is recommended, and do not read the cafeteria where it is not;
4. The Interviewer is under obligations resulting from the code of ESOMAR and the Act on personal data protection (The ACT on personal data protection of 29 August 1997) and in particular:
 - a. Under the disclosure obligation, the Interviewer informs about the situation of the research to which the respondent is invited (the respondent has to be aware that he/she takes part on the social research);
 - b. Under the disclosure obligation, the Interviewer informs about the source of the respondent's personal data and the aim of data processing;
 - c. The Interviewer informs the respondent at whose request the research is conducted;
 - d. The Interviewer protects the respondent's personal data: the Interviewer does not reveal data to third parties, protects the carrier on which personal data are saved. In the case of loss of the data carrier, the interviewer is obliged to inform immediately the police and the representative of the research company i.e. competent regional coordinator or other employee;
 - e. The Interviewer conducts the interview upon the consent of the respondent to participate in the research;
 - f. The researcher has to take precautions so the researched people are not in any way harmed or affected as a result of their participation in the market research project (source: ESOMAR Code);
 - g. The researched have to be able to verify the identity of the researcher and the fact that he/she acts in good faith (source: ESOMAR Code). The interviewer always carries a valid Interviewer's ID;
 - h. Interviewer tries to guarantee that the respondent will not incur any personal damage or suffer harm.

SUMMARY OF SELECTED INTERVIEWING TECHNIQUES

1. The respondent answers the questions on his/her own. The interviewer takes care of the interview arrangement, suggests that that the respondent should answer questions without any influence of third parties;
2. The interviewer reads out the content of questions according to the questionnaire and the instruction;
3. The interviewer asks more questions to extend open-ended and half-open-ended questions, e.g. do you want to add anything else?" or "Please justify your choice." The interviewer gives the respondent sufficient time to think about the question and give an answer;
4. The interviewer does not judge the respondent's answers;
5. The interviewer does not express his/her own opinions concerning any of the areas.

Informative materials for the Respondent

Warsaw, on xx.xx.xx 2012

Dear Sirs and Madams,

IBC GROUP Central Europe Holding S.A., with the registered office in Warsaw in Mokołowska 1 Street, is currently carrying out a social study under the nationwide study aiming at drafting the diagnosis of the current situation of women and men aged 50+ on the labour market in Poland. The objective of the research is to analyse the occupational situation of women and men aged 45-69 and its determinants.

The project is co-financed by the European Social Fund within the framework of Operational Programme Human Capital, Priority I "Employment and social inclusion", Operation 1.1 "Systemic support of labour market institutions". IBC GROUP Central Europe Holding S.A. is the contractor of the research, but is the direct performer of standardised interviews.

The current research is conducted at the request of Centrum Rozwoju Zasobów Ludzkich and the University of Łódź. The project is co-financed by the European Social Fund within the framework of Operational Programme Human Capital, Priority I "Employment and social inclusion", Operation 1.1 "Systemic support of labour market institutions".

You were selected to the research on the basis of the public information data base. That is why we kindly request you to take part in the research and answer the questions of the Interviewer.

We would like to assure you that the members of the research team observe the principle of confidentiality with regard to information gathered in the course of the research and will collect exclusively information connected with the research. In compliance with the principle of anonymity and confidentiality of the collected data, the results will be processed after elimination of all the identification data, maintaining all the strict rules of the social and economic research ethics.

Your answers will constitute an invaluable help. If you have any questions, please contact Research Manager –Patrycja Marcinkowska– phone:..... e-mail: patrycja.marcinkowska@ibc-group.pl

Your assistance is a necessary condition for the research to succeed. We hope that you will positively respond to our request. Thank you for your understanding and cooperation.

Yours faithfully, Research Manager

MODULE 3.
THE QUALITATIVE RESEARCH OF EMPLOYERS

**SCENARIO OF THE INDIVIDUAL
IN-DEPTH INTERVIEW (IDI)**

among

EMPLOYERS

INSTRUCTIONS FOR THE INTERVIEWER

1.	<p>Introduction. The explanation of the objectives of the survey. The scope of the subjects covered by the survey.</p> <p>Good morning!</p> <p>My name is The University of Łódź in cooperation with Centrum Rozwoju Zasobów Ludzkich is currently carrying out a research project commissioned by the Ministry of Labour and Social Policy concerning the equalisation of opportunities in the labour market for people over 45 years of age, who are experiencing more and more difficulty in finding a job or maintaining a job due to their age. Your opinion on this matter will be a valuable source of information to us and it will contribute to the creation of the catalogue of actions aiming at promoting economic activity of people aged 45+.</p> <p>We will be grateful if you agree to participate in the survey.</p>
2.	<p>Presentation of the respondent</p> <p>Determine the characteristics of the Respondent i.e. collect information concerning:</p> <ul style="list-style-type: none"> • The occupied post • The scope of responsibility/competences (a managerial post, a specialist, a member of the management board) • The scope of duties • Job seniority in this company • Age of the respondent • Total job seniority (in the course of the whole life)
3.	<p>Characteristics of the enterprise</p> <p>Determine the characteristics of the company where the Respondent works i.e. collect information concerning:</p> <ul style="list-style-type: none"> • Number of workers, including the employed on the basis of the employment contract • Number of workers aged 45+, the form of employment of these people (employment contract, contact for specific work, own business activity etc.) • The sector to which the company belongs (private, state-owned) • The type of the sector in which the company operates (trade, production, culture, services etc.) • The type of the company's objects (specific objects of the company e.g. cosmetic services, publishing services, production of spare parts for computers etc.) • The period of operation on the market • The current development stage of the company (e.g. slow development, dynamic expansion, stabilization, maintaining present situation, slowdown of the company operations) • The scale and the area of use of advanced technologies (e.g. computer technologies) • Specificity of the region (Voivodeship/district/commune) where the company operates (from the perspective of the situation in the labour market and the demographical situation etc.)
4.	<p>Model of human resources management</p>
4a.	<p>SECTION FOR COMPANIES WHICH EMPLOY PEOPLE AGED 45+</p> <p>Determine:</p> <ul style="list-style-type: none"> • Posts occupied by people aged 45+ (is there any particular type of posts that people aged 45+ occupy relatively more often?) and posts dominated by people below 45 years of age; factors that employers take into consideration when offering a given post to people aged 45+; do employers assign duties to workers taking into consideration only qualifications and lack of medical contraindications or perhaps the mere fact of reaching a certain age determines the assignment of a given post (including a transfer to another post) • Types of duties performed by people aged 45+ (is there any particular type of tasks assigned to people aged 45+ relatively more often than to people from other age groups?) if yes, justify why • The system in which people aged 45+ work (task-based, 8-hour, teleworking, flexible working hours, full-time, part-time, service contract); does the work system of people aged 45+ differ from the work system of other employees? To what extent? What are the reasons?

- What results people aged 45+ achieve and how they differ from the results achieved by employees from other age groups (take into consideration the specificity of the company);
- Sick absenteeism of people at the pre-retirement age in comparison to other age groups; is it more common for women or men? Do women at the pre-retirement age overuse sick leaves?
- A general Respondent's evaluation of work of people aged 45+ (results of their performance, the level of commitment etc.)
- Types of trainings increasing qualifications of employees which are conducted within the company; types of trainings increasing qualifications in which people aged 45+ participate; the use of provisions facilitating trainings of older employees (*Notice for the Interviewer: in July 2010 the possibility to provide employees developing their occupational qualifications on the employer's initiative or with his consent with a paid training leave was introduced; it also provides for the possibility of paid absence from a whole day of work or its part allowing to punctually arrive at the place of compulsory training and of paid leave for the duration of the training; moreover, the employer can provide this employee with additional benefits such as refund of cost of education, commuting, accommodation or purchase of books – the value of these benefits is exempt from personal income tax; a new form of economic activation for the 50+ unemployed and searching for work - vocational trainings – was introduced*)
- The respondent's opinions on the difference between employees aged 45+ and other employees of this company as far as their demand for trainings is concerned;
- Whether among people aged 45+ are workers at the retirement age; if yes, find out why the company/entity decided to continue the cooperation with such employees
- Whether there are people at the pre-retirement age among workers; if yes, determine whether there is more women or men; whether the company would like them to work in the company after reaching the retirement age; are they going to persuade them to stay? What encouragements will be used?
- The manner of employment of new workers; how looks the recruitment process, what are the priorities when employing new workers, what features are taken into consideration first? How the profile of a sought-after candidate is prepared?, is age taken into consideration?, what is the age after reaching which it is hard to get a job?
- Procedures connected with dismissal of people aged 45+; do procedures depend on the age of dismissed person? Does the company cooperate in this area with trade unions or workers' councils? How this cooperation looks like?
- Whether outplacement is applied with regard to dismissed people aged 45+? In what extent these operations are specific to this age group and in what extent they are standard procedures used regardless of age; is the age a factor that decides about the selection of support form?
- Whether generation gap is visible in the company/institution? What are its symptoms? What effects it causes? How can it be prevented? How can it be alleviated? How harmful outcomes can be eliminated?
- Whether the company undertakes any actions aiming to maintain people aged 45+ in employment and to employ new people aged 45+.

If yes:

- Determine what kind of actions it undertakes; whether it concerns people aged 45+ or older?
- Who used it more frequently, men or women? or sex does not matter?
- Are these actions included in the company/organization's programme?

IF YES: what are guidelines of this programme? When it was introduced? Why it was introduced? Who is responsible for its execution?

IF NO: Do they have such plans?

- Is it important for the company to use knowledge and experience of people aged 45+; examples of using knowledge and experience of people aged 45+ in the company
- Does the company/institution use practically any of the methods of exchanging knowledge and experience between older and younger employees? e.g. by organizing teams consisting of very young employees and workers at the pre-retirement age?

	<ul style="list-style-type: none"> • Whether the respondent knows methods of age management? <ul style="list-style-type: none"> – Employment planning taking into consideration age of workers, – Selection of employment forms taking into consideration age of workers – Organization of working time taking into consideration age of workers – Designing work space taking into consideration age of workers – Transfers to other posts – Remuneration for competences – Selection of duties taking into consideration psycho-physical predispositions of older employees – Carrier management which allows for the exchange of experience among employees at various age – Training methods which consist of the exchange of experience e.g. mentoring – Creating teams diversified by age to make use of diverse knowledge and experience of workers in different age – Knowledge management • Does your company/institution use such solutions? <p>IF YES: how they are evaluated?</p> <p>IF NO: has your company/institution attempted to introduce the above-mentioned solutions but without results? If yes, what problems occur while trying to introduce them? Have you tried to overcome them?</p> <ul style="list-style-type: none"> • Do you have any bonuses connected with the improvement in health of an employee in the offer of your institution/ company? Do you have bonuses which are usually chosen by people aged 45+, or the employer has noticed that they are interested in certain kinds of bonuses • Have your institution/ company/ office taken part in any programme co-financed by EU funds which regarded people aged 45+ (both in last financial perspective 2004-2006 and in the current one 2007-2013)?which programme was it? What was its objective? To what extent did it seem useful? How did it influence the usefulness of an employee?
4b.	SECTION FOR COMPANIES WHICH DO NOT EMPLOY PEOPLE AGED 45+
	<p>Determine:</p> <ul style="list-style-type: none"> • The average age of employed workers • What are the reasons for employing people at this age? • Whether the company has considered employing people aged 45+; what are the reasons, in the opinion of the Respondent, for employing or not employing women and men at this age; <i>if the respondent is not able to give reasons, you should ask about the following groups of problems connected with:</i> <ul style="list-style-type: none"> – The specificity of the company, its age, its management model (business, sector in which the company operates do not allow to employ people at this age); – The image of the company in the market (e.g. company wants to be associated with a company promoting youth etc.); – External conditions which do not depend on the company (e.g. legal regulations hinder employing people aged 45+); – Reluctance of people aged 45+ to apply for a job in this company; – Other reasons.
5.	Opinions on older workers
	<p>Determine:</p> <ul style="list-style-type: none"> • What are, in the Respondent's opinion assets of employees 45+; who are better perceived: women or men 45+? Ask for justification • What are weak points of employees 45+; with what duties employees aged 45+ do not cope or would not cope; what about people aged 50+ or 55+? Ask for justification each time • Differences in competences, personality of people aged 45+ and younger employees (take into consideration women and men) • What are the best, in the Respondent's opinion, methods of motivating women and men aged 45+ to work satisfactorily (differentiate between motivating 45+ women and 45+ men)

- Types of situations (e.g. situations requiring fast decisions, stressful work, work with a high degree of self-reliance) in which, in the Respondent's opinion, older employees cope worse than younger people (ask for examples of situations that the Respondent has encountered or heard of; ask whether the sex has any significance in this area)
- Whether the interest in continuation of the employment is connected to the sex of an employee? Ask for justification
- Commonly established opinions, stereotypes about 45+ employees which the Respondent has heard of (ask for examples and whether the Respondent agrees or disagrees with each of the mentioned opinions – we are very interested in the Respondent's justifications; ask whether the sex has any significance in this area)

If the Respondent is not able to come up with any popular views about this group of workers, you can use the following examples. Each time ask whether a given evaluation concerns both women and men or whether the sex is a diversifying factor. Each time we determine whether the Respondent has heard of such opinion and whether he agrees or disagrees with it. For support of his/her opinion he/she should give some exemplary situations which would prove that a given statement is true or false. We have to determine whether the Respondent has experienced such situations personally. Attention: you absolutely must not begin this section by reading the opinions below, imposing them on the Respondent.

- Employers above 45 years of age do not want to participate in trainings, learn new technologies, learn foreign languages etc.
- Employees above 45 years of age have a unique knowledge about the company and the arcana of their professions
- Employees above 45 years of age are less flexible and for example protest against staying longer at work, going on business trips with the need of accommodation etc. Does it concern rather women or men?
- The older employee is, the more loyal he/she becomes – they respect work much more
- Employees above 45 years of age become less efficient than other workers, they work slower and make mistakes more often
- Employees above 45 years of age are sick more often and it excludes them from performing tasks which require regular presence at work
- Employees above 45 years of age cost more
- Employees above 45 years of age have wrong habits resulting from working in PRL which are impossible to change
- Employees above 45 years of age have a lower level of motivation connected with the lack of possibilities for occupational promotion
- Employees above 45 years of age are less creative, less innovative
- Employees above 45 years of age dream only about retirement or disability pension

Determine::

- Whether, in the Respondent's opinion "older" employees do not cope/ would not cope with the performance of some tasks; At what age these problems occur? Is the sex of an employee significant in this aspect? Ask for justification of these opinions
- The most important factors (circumstances) which, in the Respondent's opinion as a person responsible for employing workers, would encourage people with the right to retire and with pre-retirement entitlements to return to work? Are these factors the same for women and men? Which of them are currently introduced in your company/institution and which you would be willing to implement?

INTERVIEWER: ask whether the respondent wants to add anything.

6.	Legal determinants regarding the economic activation of people aged 45+ (and 50+)
	<p>Determine:</p> <ul style="list-style-type: none"> • How the Respondent evaluates the legal regulations related to the economic activation of people aged 45+. For this purpose, you can ask the following question: please evaluate whether in the context of equalisation of opportunities for people aged 45+ the existing legal regulations influence the economic activation of this age group, especially the unemployed aged 45+. Please indicate which, in your opinion, influenced the situation of people aged 45+ (including 50+) in the Labour market most significantly. <p><i>INTERVIEWER: if the respondent is not able to give any examples, you can use the list below to help him/her or point out to some of the regulations/solutions but you should not ask in detail about the whole list, if the respondent says that he/she does not know any of the solutions or operations.</i></p> <ul style="list-style-type: none"> • Shortening from 33 to 14 days the period for which the employer has to pay for the employee's sickness, • The provision in the Labour Code that the employer cannot terminate the employment contract of an employee who is four years before the retirement age, • Introduction of antidiscrimination regulations regarding the issue of equal treatment in the area of employment regardless of sex, age, disability, race, religion etc., • Introduction of the provisions regulating outplacement; the employer intending to dismiss at least 50 workers within 3 months is obliged to determine the scope and the form of support for the dismissed employees with the competent offices, • Priority privilege meaning that the district labour office has the obligation to present people aged 50 and over with employment propositions, possibilities of other gainful employment, trainings, internships, vocational adult trainings or employment in the area of intervention or public works within the period of up to 6 months after registration, • Introduction of the possibility to employ the unemployed aged 50 and over in the area of intervention and public works on the basis of conditions more favourable than in the case of other groups, • Sending people aged 50 and over to free trainings in order to increase their occupational and other qualifications, • Covering costs of post-graduate studies for people aged 50 and over, • Covering costs of examinations which allow to acquire certificates, diplomas, occupational qualifications or occupational titles and costs of licences necessary to perform a given profession, • Possibility of people aged 50 and over to obtain loans without interest for covering costs of trainings in order to take up or maintain their jobs or other gainful employment, • Sending people aged 50 and over to serve an internship (max. 6 months) in the course of which they are entitled to a grant in the amount of 120% of the unemployment benefit, • Sending people aged 50 and over to participate in 12-18-month vocational adult training in the course of which they are entitled to a grant in the amount of 120% of the unemployment benefit, • Financing the purchase of equipment for the work station up to the amount 6 times bigger than the average remuneration for the employers employing an unemployed person aged 50 and over, • Limiting the number of people entitled to retire earlier due to work under special conditions or work of special nature (bridging retirement), • Limiting the possibility to combine occupational work with receiving the whole amount of retirement in the case of people who have the predetermined right to retire but have not yet reached the retirement age, • Introduction of the so called Nursery Act which facilitates the establishment of crèches and children's clubs (providing care by maximally 5 hours a day) as well as the co-financing of costs of a baby sitter or a care giver (taking care of max. 5 children), • Allowing to finance company kindergartens from the social benefits fund.

7.	Operations aiming to improve the situation of people aged 45+ in the labour market
	<p>Determine:</p> <ul style="list-style-type: none"> • The Respondent's opinions on the most sought-after employees (<i>ask about women and men</i>) • The Respondent's opinions on factors that can lower the attractiveness of people in the labour market (<i>ask about women and men</i>) <p>If the Respondent will not indicate the advanced age as one of them, ask: can the age be a criterion lowering the attractiveness of an employee (<i>in the case of women and men</i>) in the labour market. <i>Ask for justification.</i></p> <p>Determine:</p> <ul style="list-style-type: none"> • Whether the Respondent agrees or disagrees with the opinion that women and men aged 45+ are less willingly employed than younger candidates? <i>Ask for justification.</i> • Operations that, in the Respondent's opinion could make people aged 45+ more active in the labour market (<i>explain that it concerns operations that could encourage employers to employ such people, as well as operations which would increase the attractiveness of 45+ workers; ask the Respondent who should initiate such operations and who should be responsible for their execution and implementation</i>) <p>Determine:</p> <ul style="list-style-type: none"> • The Respondent's opinion on supporting by the State the operations that aim to improve the situation of people aged 45+ in the labour market; what operations, in the Respondent's view, should be undertaken in this area? • The Respondent's opinion on extending the period of active occupational life of Poles. Do we need encouragements/ preferential treatment which have to persuade employees and employers to extend the period of active occupational life of people aged 45+? If yes, what kind? If not, why? Will the raise of the retirement age influence the number of employed women and men aged 45+ (50+)? What advantages and disadvantages does the Respondent see in raising the retirement age from the perspective of his/her company/institution? • Whether the Respondent has heard of the governmental programme "Solidarity between generations. Actions aiming at increasing the economic activity among people aged 50+"; does he/she know the operations suggested by "Solidarity between generations. Actions aiming at increasing the economic activity among people aged 50+"? (ask the Respondent to give examples of these operations); how does he/she evaluate them? • What changes, in the Respondent's view, should be introduced in the nearest future and what changes later. <p><i>INTERVIEWER: ask whether the respondent wants to add anything.</i></p>
<p>Thanking for the participation in the interview. Ending the interview.</p>	

**MODULE 4.
QUALITATIVE RESEARCH
OF DISTRICT LABOUR AGENCIES**

**SCENARIO OF THE INDIVIDUAL
IN-DEPTH INTERVIEW (IDI**

among

DISTRICT LABOUR AGENCIES

NOTE: The list of instructions for the Interviewer does not constitute a list of ready-made questions to the Respondent, but a list specifying pieces of information that should be obtained during the interviews. The content, order and form of the questions should be adapted to a given Respondent. Please do not feel content with the first answers, you should ask the Respondent to elaborate, explain and give examples. During the interview, the Interviewer should often apply prompting and probing. Notes for the Interviewer in the instructions have been written in italics.

Instructions for the Interviewer: in the 3rd, 4th and 5th part of the interview you should specify the lower age limit adopted by the DLO for the specific actions carried out for the benefit of the elderly people (45, 50 years).

INSTRUCTIONS FOR THE INTERVIEWER	
1.	<p>Introduction. Explanation of the objectives of the survey. The scope of the subjects covered by the survey</p> <p>Good morning!</p> <p>NMy name is The University of Łódź in cooperation with Centrum Rozwoju Zasobów Ludzkich is currently carrying out a research project commissioned by the Ministry of Labour and Social Policy concerning the equalisation of opportunities in the labour market for people over 45 years of age, who are experiencing more and more difficulty in finding a job or maintaining a job due to their age. Your opinion on this matter will be a valuable source of information to us and it will contribute to the creation of the catalogue of actions aiming at promoting economic activity of people aged 45+.</p> <p>We will be grateful if you agree to participate in the survey.</p>
2.	<p>Presentation of the Respondent</p> <p><u>Determine:</u></p> <ul style="list-style-type: none"> • the scope of tasks performed in the agency where the Respondent is employed • the scope of tasks for which the Respondent is responsible.
3.	<p>Analysis of the situation of people aged 45 (including 50+) on the local labour market</p> <p><u>Determine:</u></p> <ul style="list-style-type: none"> • the Respondent's first associations with the topic of people at the age 45+ (<i>we are interested in the opinion on the Respondent as a person dealing with the labour market</i>) • the sources of information used by the Respondent's agency in order to determine the situation of people aged 45+ (including 50+) on the local labour market • whether the agency in which the Respondent is employed has performed the analysis of the situation of people aged 45+ (including 50+) on the local labour market within the last two years; (<i>we are interested in separate research, not only a regular analysis of statistical data included in the basic reports of the labour agency</i>) • the reasons why such research has not been conducted in the agency in which the Respondent is employed; (<i>this piece of information should be acquired in the agencies that have not performed the said diagnosis</i>) • the form of the research that was the basis of the diagnosis (<i>this and further pieces of information should be gained in the agencies in which the diagnosis was performed</i>) • the scope of information included in the diagnosis: the problems and needs of the group of people aged 45+, the features of these people, other additional information exceeding regular information held by the agency as part of the so-called labour market statistics • whether the results of the diagnosis are reflected in the actions performed by the agency for the benefit of people aged 45+ (including 50+), and how the statistics are taken into consideration • the main problems and needs of people aged 45+ on the local labour market (<i>you should take into consideration the standard data held by the labour agency and any additional information gained as a result of conducting the diagnosis</i>) • the features, so-called strengths, of people 45+ (including 50+) • the Respondent's opinion whether people aged 45+ that try to find employment via the agency in which the Respondent is employed are generally willing to accept <u>any</u> job, and whether there are people who, in general, <u>really</u> want to be employed? (<i>ask the Respondent to justify their opinion</i>)

	<ul style="list-style-type: none"> • whether the Respondent witnessed a situation where the applicants aged 45+ expressed any particular expectations as to the job (the kind of job: non-strenuous, manual, shift work, or payroll expectations etc.) in comparison with younger applicants • whether the Respondent witnessed a situation where the applicants aged 45+ expressed any particular expectations as to the employer (e.g. Polish, foreign, small, large, a particular company) in comparison with the applicants aged 35-45 • the Respondent's opinion on the age limit above which the older employees become unattractive to the present and/or prospective employer, and the Respondent's specification of such limit (<i>ask for justification</i>) • whether the age limit can be attributed to a specific profession (<i>determine the professions meant by the Respondent</i>) • the Respondent's opinion on the expectations of people aged 45+ (including 50+) as regards activation actions initiated by labour agencies; the fields under which these actions can be subsumed (professional, social, other?); actions which are preferred the most by people aged 50+/45+ • the Respondent's overall evaluation of the situation of people aged 45+ (including 50+) on the Polish labour market • opinions and stereotypes concerning people aged 45+ in the labour market which the Respondent knows or has heard of • the Respondent's opinion on levelling the retirement age of men and women (<i>we are also interested in the Respondent's justification of the opinion on this subject</i>)
4.	The Agency's actions for the economic activation of people aged 45+ (50+)
	<p><u>Determine:</u></p> <ul style="list-style-type: none"> • whether in the last two years in the agency in which the Respondent is employed there have been developed and implemented special programmes aimed at economic activation of people aged 45+ (including 50+) • the causes for which such programmes have not been developed (<i>information to be acquired in the agencies that have not developed such programmes</i>) • the guidelines and rules that are applied in performing the actions for the benefit of people aged 45+ (including 50+); (<i>it is important that the Respondent answer the question whether certain global (EU), national (Strategy 2020) and regional (e.g. district development strategy) strategies and certain legal regulations are implemented</i>) • the sources of financing programmes for the benefit of people aged 45+ (including 50+) (<i>you should obtain the information whether there were several sources or one source, and ask the Respondent to name them, e.g. Labour Fund, European Social Fund, means from the district governor's budget. If the Respondent lists several sources, you should inquire to what extent each of the sources financed the implemented project and programme</i>) • the kinds of activation actions (services) and tools that have been used in the implemented projects/programmes • the criteria for selection of the tools; their employment effectiveness (<i>you should establish the percentage of the participants of the programmes that started a job within 3 months as of the date of the termination of the project</i>) • the types of actions <u>most often</u> taken by the agency in order to activate people aged 45+ (<i>this and the following questions should be answered both by the Respondent who claimed the agency carried out special projects, and the Respondent who stated that such programmes were not implemented</i>) • the kinds of actions that turned out to be <u>the most effective</u> in economic re-activation of people aged 45+ (<i>the question of effectiveness should be related to the opportunities for re-employment after the activation programme has ended, e.g. after intervention works, traineeships, trainings, community service etc.</i>) • whether, apart from the actions aimed exclusively at the elderly people, the unemployed aged 45+ (including 50+) are regarded as special beneficiaries of the economic activation projects designed for various groups of the unemployed, whether their chances are equal, smaller or greater comparing to other categories of the unemployed as regards the opportunity to participate in traineeships, intervention works, and trainings. What are these projects and activation programmes for the unemployed people aged 45+ (including 50+) • the scope and kind of promotional and information campaigns carried out by the agency aimed at: breaking stereotypes about people aged 45+ (including 50+), informing employers about the benefits of employing workers aged 45+ (including 50+) (<i>if the Respondents claim that such actions are not performed in their agencies, you should ask for the reasons; if such actions are carried out in a given agency, establish their form and determine what they consist in</i>) • types of the projects for people aged 45+ (including 50+) that have been implemented so far (training consultative, informative, integrative) (<i>it is important that the Respondent describes the projects in detail</i>)

	<ul style="list-style-type: none"> the agency's plans regarding the activation projects for the elderly people which the agency intends to implement in the future the Respondent's assessment of the efficiency of the implemented economic activation programmes for the unemployed people aged 45+ (including 50+) the ways of monitoring the implementation of actions for the benefit of people aged 45+ (including 50+). Are there any separate statistics for this group of the unemployed? the Respondent's opinions on the problems in the implementation of activation projects for people aged 45+ (including 50+) they have noticed the Respondent's opinion on the new solutions (e.g. legal, organizational, financial) that would facilitate the agency's actions in the field of activation of people aged 45+ (including 50+) whether other institutions and organizations in the district undertake actions for the benefit of people aged 45+ (including 50+). What are these organizations and institutions? How does the Respondent assess their actions?
5.	<p>Opinion on the package of actions for improving the situation of people aged 45+ in the labour market</p>
	<p><u>Ustalić:</u> the Respondent's assessment of legal regulations concerning economic activity of the 45+ age group. <i>You may ask the following question:</i> Please assess whether in relation to providing equal opportunities for people aged 45+, the present legal regulations exercise impact on economic activity of the said age group, in particular unemployed people aged 45+. Point those which, in your opinion, had the greatest effect on the situation of people aged 45+ (including 50+) in the labour market.</p> <p><i>INTERVIEWER: If the Respondent cannot think of anything, the Interviewer may refer to the list below in order to help the Respondent or show the Respondent certain regulations/solutions. However, do not ask in detail about the issues listed if the Respondent clearly states that they do not know any solutions or actions.</i></p> <ul style="list-style-type: none"> shortening the period in which the employer pays for the employee's sickness from 33 to 14 days, the stipulation in the Labour Code under which the employer cannot terminate the employment contract with the employee who will be in the retirement age in less than 4 years, introduction of anti-discrimination regulations related to the problems of equal treatment in the field of employment regardless of the age, sex, disability, race, religion, etc., introduction of regulations of the so-called outplacement; the employer that intends to dismiss at least 50 employees within the period of 3 months is required to establish, in cooperation with the relevant agency, the scope and forms of assistance to the dismissed employees, the right of priority, i.e. the district labour agency is obliged to provide people aged 50+ with the offer of employment, other gainful activity, training, traineeship, vocational training for adults or employment in intervention works or public works within 6 months as of the day of registration, introduction of the possibility to employ jobless people aged 50+ in intervention works and public works on the more advantageous conditions compared with other groups, enrolling a person aged 50+ in a free training aimed at improving occupational qualifications and other qualifications, financing postgraduate courses for a person aged 50+, financing the costs of exams that will result in gaining certificates, diplomas, certain professional qualifications or occupational titles as well as the costs of obtaining licences necessary to perform a given job - for a person aged 50+, the opportunity for a person aged 50+ to obtain a loan with little interest in order to cover the costs of training that will enable a given person to start or maintain employment or other gainful activity, enrolling a person aged 50+ in a traineeship (6 months maximum), during which one is entitled to a scholarship amounting to 120% of the unemployment benefit, introduction of co-funding the workplace equipment up to the amount 6 times higher than the average remuneration for the employer giving job to an unemployed person aged 50+, limiting the number of people entitled to earlier retirement due to the work in special conditions or of special nature (the so-called bridging pensions), limiting the possibility of pairing economic activity and earning with receiving retirement benefit as regards people who are entitled to retirement pension but have not reached the general retirement age, introduction of the so-called nursery act that has facilitated opening nurseries and created the opportunity to establish the so-called child clubs (offering child care for 5 hours per day at maximum), as well as the opportunity to co-finance child care provided by a daily caregiver or a nanny,

	<ul style="list-style-type: none"> • allowing for financing company kindergartens from the social benefits fund, • the Respondent's opinion on the state's support of the actions aimed at improving the situation of people aged 45+ in the labour market; the actions that should be taken in this regard according to the Respondent, • whether the Respondent has heard of the government programme <i>Solidarity between generations. Actions aiming at increasing the economic activity among people aged 50+</i>. Is the Respondent familiar with the actions suggested in the programme <i>Solidarity between generations. Actions aiming at increasing the economic activity among people aged 50+</i>? (ask the Respondent to provide the examples of such actions). How does the Respondent assess these actions? • the changes (legislative, system and other changes) that, in the Respondent's opinion, should be introduced in this matter in the near future and in the long-term perspective.
7.	Cooperation between the Agency and other entities in the field of economic activation of people aged 45+ (including 50+)
	<p><u>Determine:</u></p> <ul style="list-style-type: none"> • the partners with whom the agency cooperates during the implementation of the projects for the benefit of people aged 45+ (including 50+) and the groups to which they may be qualified, e.g. non-governmental organizations, ecclesiastical legal people, organizational units of social welfare, welfare centres. What exactly does the said cooperation consist in? What are the chief advantages, and what problems may arise in the cooperation? • the partners with whom the Respondent would like to cooperate during performing actions aiming at economic activation of people aged 45+ (including 50+). Ask the Respondent to justify the choice.
	Thanking for the participation in the interview. Ending the interview.

MODULE 5.
QUALITATIVE RESEARCH
OF EMPLOYMENT AGENCIES

**SCENARIO OF THE INDIVIDUAL
IN-DEPTH INTERVIEW (IDI)**

among

EMPLOYMENT AGENCIES

NOTE: The list of instructions for the Interviewer does not constitute a list of ready-made questions to the Respondent, but a list specifying pieces of information that should be obtained during the interviews. The content, order and form of the questions should be adapted to a given Respondent. Please do not feel content with the first answers, you should ask the Respondent to elaborate, explain and give examples. During the interview, the Interviewer should often apply prompting and probing. Notes for the Interviewer in the instructions have been written in italics

INSTRUCTIONS FOR THE INTERVIEWER	
1.	<p>Introduction. Explanation of the objectives of the survey. The scope of the subjects covered by the survey.</p> <p><i>Good morning!</i></p> <p><i>My name is The University of Łódź in cooperation with Centrum Rozwoju Zasobów Ludzkich is currently carrying out a research project commissioned by the Ministry of Labour and Social Policy concerning the equalisation of opportunities in the labour market for people over 45 years of age, who are experiencing more and more difficulty in finding a job or maintaining a job due to their age. Your opinion on this matter will be a valuable source of information to us and it will contribute to the creation of the catalogue of actions aiming at promoting economic activity of people aged 45+.</i></p> <p><i>We will be grateful if you agree to participate in the survey.</i></p>
2.	<p>Presentation of the Respondent.</p> <p><u>Determine:</u></p> <ul style="list-style-type: none"> • the scope of tasks performed in the agency where the Respondent is employed • the scope of tasks for which the Respondent is responsible.
3.	<p>Sporządzenie charakterystyki agencji zatrudnienia</p> <p><u>Determine:</u></p> <ul style="list-style-type: none"> • characteristics of the region (Voivodeship/district/commune) in which the employment agency operates • the type of the unit, forms of property and location, the duration of the agency's functioning on the market, its specialty (<i>specialty of the organization should be established in relation to the following fields: employment agency in Poland, employment agency abroad, professional counselling, personal counselling, temporary employment services</i>) • size (potential of the unit) – the number of permanent employees, the number of external employees cooperating with the agency, and forms of such cooperation • the position of people aged 45+ in the employment agency (their share in the overall number of employees, the posts they occupy, the form of cooperation) • the description of the staff responsible for the recruitment of people aged 45+ (do they belong to the same age group, are they at the same level of education, are they agents, career counsellors?).
4.	<p>Methods of work in the employment agency</p> <p><u>Determine:</u></p> <ul style="list-style-type: none"> • whether the employment agency services offered by the agency in which the Respondent is employed include the employment agency services for people aged 45+/50+ (<i>if it does not provide such services, give reasons</i>) • <i>as regards the agencies that provide such services, it should be determined: what is the nature of the agency: national or abroad? (In this case, the Respondent should also establish the percentages of clients that make use of the services provided by national and foreign agencies respectively)</i> • the percentage of work candidates aged 45+ in comparison to the overall number of candidates using the services of the agency • whether within the last year the percentage of work candidates aged 45+ in the overall number of candidates using the services of the agency increased, decreased or remained unchanged (<i>obtain the information explaining this change</i>) • recruitment and selection methods applied by the Respondent's agency in relation to people aged 45+/50+ (e.g. references from the previous workplaces, personal interview, psychological test (which ones?), graphology, astrology, document analysis (CV, covering letter), telephone interview, language skills tests, work samples and simulations, medical tests etc.)

	<ul style="list-style-type: none"> • whether the methods used in relation to people aged 45+ differ from the ones applied in the recruitment and selection process of people who are less than 45 years old • whether there are any special, original methods of recruitment and selection of people aged 45+/50+ (<i>ask the Respondent to describe the method in detail</i>) • the Respondent's observations regarding the differences between people over and below 45 years of age in terms of the period of seeking the employment via employment agency. What does the difference consist in? • the list of professions that are most often subject to agency (<i>in this as well as the two other points, we are interested in the agency services at the territory of the country</i>). Does the Respondent's agency provide headhunting recruitment services? (<i>if the Respondent gives a positive answer to this question, we inquire: whether the headhunting services include people aged 45+ and how many such people were recruited in the last 12 months. How many people have been recruited in headhunting process in general? If this group does not include people aged 45+, determine why.</i>) • whether the Respondent's agency offers executive search services (<i>if yes, do these services include people aged 45+? How many such people were recruited in the last 12 months? How many people were recruited as a result of executive search in general? If people aged 45+ are not included in this group, determine why.</i>) • whether the Respondent's agency offers recruitment services for the job abroad (<i>if yes, does this offer include people aged 45+? How many such people were recruited in the last 12 months? How many people were recruited for a job abroad in general? If people aged 45+ are not included in this group, determine why.</i>) • in what professions, in the Respondent's opinion, people aged 45+ can the most easily find a job • whether the Respondent's agency provides counselling services that consist in preparing a set of application documents (CV, covering letter)? (<i>if yes, how many people made use of these services in the last 12 months? Did this group include people aged 45+?</i>) • whether the Respondent's agency provides counselling services that consist in creating competence balances based on tests (<i>if yes, who is the chief client of such services (employer, a natural person being an individual client) how many employers/people made use of these services in the last 12 months? Did this group include people aged 45+?</i>) • whether the Respondent's agency offers counselling services consisting in preparing a personal portfolio based on an integrated assessment method (Assessment Centre) (<i>if yes, in what percentage are they addressed to people aged 45+?</i>) • whether the agency offers counselling services of other kind aimed at people aged 45+ (<i>if yes, provide a description</i>) • whether the Respondent's agency offers recruitment services for temporary employment (<i>if yes, does this offer include people aged 45+? If people aged 45+ are not included in this group, determine why.</i>) (THE INTERVIEWER: <i>the question refers only to Respondents who listed recruitment for temporary employment among the services provided by the agency</i>) • the number of people who were recruited for temporary employment within the last 12 months as well as the percentage constituted by people aged 45+ • the type of agreements concluded with people employed for temporary work; the percentage of employers with whom the respective types of agreements were concluded: civil law agreements (contract for specific work, service contract), employment contract; the type of agreement that is the most common as regards temporary employment • the structure of employment contracts concluded with people aged 45+ - the percentage of people employed on the basis of civil law contracts and employment contract • the ways in which the clients may submit application documents to the company (via e-mail, mail, in person); the way of submitting documents that is the most preferred by people aged 45+ • a list of projects that have been carried out by the agency and have been addressed <u>exclusively</u> to people aged 45+ (<i>The Respondent may also list projects implemented by the agency in cooperation with other labour market institutions, such as training institutions</i>) What was the reason for the interest in such kind of project? The sources of financing the projects The activities/services offered as part of the projects
5.	Applicants and employers
	<p><u>Determine:</u></p> <ul style="list-style-type: none"> • whether the Respondent witnesses situations where the employers – clients searching for people to employ show any barriers in employing people aged 45+. Do the employers explicitly show their unwillingness to employ people aged 45+? Do they give any reasons for their decision? Do they provide any additional justification? Do they specify the age limit that is "critical" to them (below which they do not recruit an employee)? How do they justify it?

	<ul style="list-style-type: none"> • whether the employers contacting the agency demand that the employment guarantee clause be included in the contract (<i>If yes, does the problem more often concern people over or under 45 years of age?</i>) • ways of monitoring the level of satisfaction of clients for whom the services/actions connected with worker recruitment/selection were performed. Were the services related to people aged 45+ assessed the same way as in the case of younger people, or were they considered worse? What were the problems? What was evaluated negatively by the employers (maladjusted professional/personal profile), and what by the employees aged 45+ (e.g. discrepancy between the factual working conditions and those presented by the agency)? • whether the Respondent noticed any barriers in employing elderly people in comparison with younger candidates • whether the Respondent witnessed a situation where the employer explicitly showed particular interest in employing people aged 45+. What was the reason for the interest? • whether the Respondent noticed that the employers – clients of the agency – introduce age management standards in their companies. What standards did the Respondent hear of? (<i>please describe the standards in detail</i>)
6.	The Agency's strategies concerning people aged 45+
	<p><u>Determine:</u></p> <ul style="list-style-type: none"> • whether the agency conducts analyses of the labour market concerning the age of prospective employees. <i>If yes, what do they consist in? What resources have been used?</i> • the Respondent's opinion on: the strengths of employees aged 45+; establishing a list of features which the Respondent finds in the candidates aged 45+ who contact the agency as they look for a job • the weaknesses of employees aged 45+; establishing a list of features which the Respondent finds in the candidates aged 45+ who contact the agency as they look for a job • the Respondent's opinion on: the age limit above which the employees become unattractive to the employer – both the present and prospective one; connecting the age limit with specific professions; what professions is it usually connected with? (<i>ask for justification</i>) • the Respondent's opinion on the following issues: do the people aged 45+ who seek employment via the agency want to start <u>any</u> job? Do they <u>really</u> want to start working? Why does the Respondent think so? • whether the Respondent witnessed a situation where the applicants aged 45+ expressed any particular expectations as to the job (the kind of job: non-strenuous, manual, shift work, or payroll expectations etc.) in comparison with younger applicants • whether the Respondent witnessed a situation where the applicants aged 45+ expressed any particular expectations as to the employer (e.g. Polish, foreign, small, large, a particular company) in comparison with the applicants aged 35-45 • the Respondent's attitude to the actions aiming at extending the period of economic activity of Poles and the use of incentives/preferences with a view to encouraging employees and employers to extend the duration of their economic activity • opinions and stereotypes concerning people aged 45+ in the labour market that the Respondent has heard of; which of them could the Respondent relate to the labour market which the Respondent's agency deals with? • the Responder's opinion on levelling the retirement age of men and women (<i>request to justify the opinion on this issue</i>)
7.	Opinion on the package of actions for improving the situation of people aged 45+ in the labour market
	<p><u>Determine:</u></p> <ul style="list-style-type: none"> • the Respondent's assessment of legal regulations concerning economic activity of the 45+ age group. <i>You may ask the following question: Please assess whether in relation to providing equal opportunities for people aged 45+, the present legal regulations exercise impact on economic activity of the said age group, in particular unemployed people aged 45+. Point those which, in your opinion, had the greatest effect on the situation of people aged 45+ (including 50+) in the labour market.</i> <p><i>INTERVIEWER: If the Respondent cannot think of anything, the Interviewer may refer to the list below in order to help the Respondent or show the Respondent certain regulations/solutions. However, do not ask in detail about the issues listed if the Respondent <u>clearly states that they do not know any solutions or actions.</u></i></p> <ul style="list-style-type: none"> • shortening the period in which the employer pays for the employee's sickness from 33 to 14 days, • the stipulation in the Labour Code under which the employer cannot terminate the employment contract with the employee who will be in the retirement age in less than 4 years,

	<ul style="list-style-type: none"> • the right of priority, i.e. the district labour agency is obliged to provide people aged 50+ with the offer of employment, other gainful activity, training, traineeship, vocational training for adults or employment in intervention works or public works within 6 months as of the day of registration, • introduction of the possibility to employ jobless people aged 50+ in intervention works and public works on the more advantageous conditions compared with other groups, • enrolling a person aged 50+ in a free training aimed at improving occupational qualifications and other qualifications, • financing postgraduate courses for a person aged 50+, • financing the costs of exams that will result in gaining certificates, diplomas, certain occupational qualifications or occupational titles as well as the costs of obtaining licences necessary to perform a given job - for a person aged 50+, • the opportunity for a person aged 50+ to obtain a loan with little interest in order to cover the costs of training that will enable a given person to start or maintain employment or other gainful activity, • enrolling a person aged 50+ in a traineeship (6 months maximum), during which one is entitled to a scholarship amounting to 120% of the unemployment benefit, • enrolling a person aged 50+ in a 12-18 months' vocational training for adults, during which one is entitled to a scholarship amounting to 120% of the unemployment benefit, • introduction of co-funding the workplace equipment up to the amount 6 times higher than the average remuneration for the employer giving job to an unemployed person aged 50+, • limiting the number of people entitled to earlier retirement due to the work in special conditions or of special nature (the so-called bridging pensions), • limiting the possibility of pairing economic activity and earning with receiving retirement benefit as regards people who are entitled to retirement pension but have not reached the general retirement age, • the Respondent's opinion on the state's support of the actions aimed at improving the situation of people aged 45+ in the labour market; the actions that should be taken in this regard according to the Respondent, • whether the Respondent heard of the governmental programme <i>Solidarity between generations. Actions aiming at increasing the economic activity among people aged 50+</i>. Is the Respondent familiar with the actions suggested in the programme <i>Solidarity between generations. Actions aiming at increasing the economic activity among people aged 50+</i>? (ask the Respondent to provide the examples of such actions). How does the Respondent assess these actions? • the changes (legislative, system and other changes) that, in the Respondent's opinion, should be introduced in this matter in the near future and in the long-term perspective..
8.	Cooperation between the employment agency and other entities in the labour market
	<p><u>Determine:</u></p> <ul style="list-style-type: none"> • the partners with whom the agency cooperates in the field of activating people aged 45+ • the scope of this cooperation; • evaluation of the cooperation with the labour market agencies listed above • the suggestions concerning the solutions that the Respondent would like to implement in order to facilitate future cooperation and achieve greater effectiveness and activation of the elderly people in the labour market
	Thanking for the participation in the interview. Ending the interview

MODULE 6.
QUALITATIVE RESEARCH
OF TRAINING INSTITUTIONS

**SCENARIO OF THE INDIVIDUAL
IN-DEPTH INTERVIEW (IDI)**

among

TRAINING INSTITUTIONS

NOTE: The list of instructions for the Interviewer does not constitute a list of ready-made questions to the Respondent, but a list specifying pieces of information that should be obtained during the interviews. The content, order and form of the questions should be adapted to a given Respondent. Please do not feel content with the first answers, you should ask the Respondent to elaborate, explain and give examples. During the interview, the Interviewer should often apply prompting and probing. Notes for the Interviewer in the instructions have been written in italics

INSTRUCTIONS FOR THE INTERVIEWER	
1.	<p>Arrangement of the discussion. Explanation of the objectives of the survey. The scope of the subjects covered in the survey.</p> <p>Good morning!</p> <p>My name is The University of Łódź in cooperation with Centrum Rozwoju Zasobów Ludzkich is currently carrying out a research project commissioned by the Ministry of Labour and Social Policy concerning the equalisation of opportunities in the labour market for people over 45 years of age, who are experiencing more and more difficulty in finding a job or maintaining a job due to their age. Your opinion on this matter will be a valuable source of information to us and it will contribute to the creation of the catalogue of actions aiming at promoting economic activity of people aged 45+. We will be grateful if you agree to participate in the survey.</p>
2.	<p>Description of the institution</p>
	<p><u>Determine:</u></p> <ul style="list-style-type: none"> • the scope of tasks performed in the institution where the Respondent is employed • the scope of tasks for which the Respondent is responsible
3.	<p>Preparing a description of the training institution</p>
	<p><u>Determine:</u></p> <ul style="list-style-type: none"> • characteristics of the region (Voivodeship/district/commune) in which the institution runs its activity • the type of the institution, the form of proprietorship, the duration of its activity on the training market • the size (potential of the unit), that is: the number of permanent employees, the number of trainers/lecturers and the forms of cooperation • the position of people aged 45+ in the training institution (their share in the overall number of employees, the posts they occupy, the form of cooperation) • description of the staff conducting trainings for people aged 45+ (do they belong to the same age group?)
4.	<p>The actions for activation of people aged 45+ performed by the institution</p>
4.1.	<p>Organization of trainings</p>
	<p><u>Determine:</u></p> <ul style="list-style-type: none"> • the list of trainings, training projects carried out by the institution in the last 2 years, which have been designed for, among others, the elderly people. What were those trainings? <i>if such trainings were not organized, why?</i> What were the financing sources? What was their scale (local, national)? What percentage of the overall number of participants was constituted by people aged 45+? • whether in the last 2 years the institution conducted training projects and trainings directly (exclusively) aimed at people aged 45+ (<i>If yes, what kind of trainings were they? What were the sources of financing the trainings? Scale of the trainings (local or national?) what part of these projects was carried out as part of the programmes financed (co-financed) by the European Social Fund What percentage of projects was commissioned by public employment services. Were there any commercial trainings, i.e. trainings not supported by public means? What percentage of trainings was constituted by commercial trainings?</i>) • <i>if the institution did not conduct trainings directly aimed at people aged 45+, try to determine why.</i> • the types of projects for the benefit of people aged 45+ carried out by the institution (training, training and counselling, training and informative projects); were they open or closed projects? (<i>ask the Respondent to describe the trainings in detail</i>)

	<ul style="list-style-type: none"> the sources of information used by the institution when launching trainings aimed at economic activation of people aged 45+; does the information come from: the local labour market, statistical data on the rate of employment/unemployment, the needs of clients i.e. employees, employers or the unemployed, or from other sources? the age groups at which the institution's activation trainings for people aged 45+ are targeted; (<i>determine whether there are any specific age ranges, e.g. exclusively people aged 45-50 or people aged 60+, or category 45+ in general</i>) whether the trainings exclusively aimed at people aged 45+ need to be longer than similar trainings designed for people aged less than 45 whether the age determines the form of training chosen for people aged 45+ (e.g. whether they need more exercises, workshops, simulation games, lectures); which forms are preferred in this age group?
4.2	Promotion of economic activation trainings for people aged 45+
	<p><u>Determine:</u></p> <ul style="list-style-type: none"> the ways of spreading information about the trainings for people aged 45+ organized in the Respondent's institution; the ways in which people aged 45+ are encouraged to take part in such trainings; the ways of contacting organizations and institutions that deal with such people and that can spread the information about trainings. <i>There should be a differentiation between commercial projects, projects carried out for DLO, and projects financed by the European Social Fund.</i>
4.3	Modes of education offered for people aged 45+ by training institutions
	<p><u>Determine:</u></p> <ul style="list-style-type: none"> the modes of education offered to people aged 45+ (courses, internships, traineeships, vocational trainings, training workshops, postgraduate courses, seminars, conferences) The request to describe the modes of education (<i>it is important to obtain information about their mean duration, the topics covered most frequently, the professions which they concerned, the education level of the participants</i>); the factors that determined the choice of given modes of education whether these modes of education differed from those addressed to people aged less than 45. Specify the differences.
4.4	Recruiting people aged 45+ for the trainings
	<p><u>Determine:</u></p> <ul style="list-style-type: none"> the sources of information about training needs of people aged 45+ (the local labour market, statistical data on the employment/unemployment rate, employees or the unemployed, other sources). Does your institution cooperate with District Labour Offices in this matter? Describe the cooperation and evaluate it. the Respondent's suggestions for changes that should be introduced in this cooperation, both when it comes to the form and rules the ways of recruiting people aged 45+ for training and the ways in which people of that age are informed about the trainings difficulties in recruiting people aged 45+ for the trainings offered by the institution. The sources of difficulties (e.g. features, predispositions, attitudes of these people, adults' not being used to continuous education, a lack of a proper offer of trainings for these people, improper modes and ways of informing about the offer of trainings etc.)
4.5	The choice of the offer of trainings aimed at the elderly people
	<p><u>Determine:</u></p> <ul style="list-style-type: none"> the estimated number of people aged 45+ who participated in the trainings organized by the Respondent's institution within the last 2 years. Were the majority of participants females or males? thematic areas of the trainings the thematic areas that receive <u>the greatest</u> interest from people aged 45+ the thematic areas that receive <u>the slightest</u> interest from people aged 45+ the ways of organising trainings for people aged 45+ (e.g. employing a psychologist, employment counsellor, organising different forms of training)

4.6	The elderly people as clients of training institutions
	<p><u>Determine:</u></p> <ul style="list-style-type: none"> the Respondent's first associations with the issue of employees aged 45+ strengths and weaknesses of employees aged 45+ (including 50+) – in general and in relation to learning opinions and stereotypes concerning people aged 45+ in the labour market (<i>ask the Respondent to provide examples</i>) the Respondent's assessment of knowledge, skills, and personal features of people aged 45+. Which of them may be classified as strengths and which as weaknesses, taking into consideration their situation in the labour market? the Respondent's opinion on the age limit above which older employees become unattractive to the employer, both the present and prospective one What precisely is this limit? <i>Ask for justification</i> the Respondent's opinion on the age limit above which the effectiveness of learning process is markedly lowered What precisely is this limit? description of people aged 45+ who participated in the trainings organized by the institution within the last 12 months (<i>In the description, the Respondent should include the following characteristics: sex, level of education, profession, status in the labour market (employed, unemployed, jobseeker), age; the way of enrolling in the training (DLO, employer, own initiative)</i>) whether the training institution conducted a diagnosis of the situation of people aged 45+ in the area where the institution operates, focusing on the qualifying and occupational needs of those people and on the needs of employers. <i>If yes</i>, are the results of the diagnosis reflected in the training programmes offered and conducted for the benefit of people aged 45+? <i>If no</i>, does the Respondent think that such a diagnosis is necessary for the activity of the institution? <i>Determine: the reasons for which it is necessary or unnecessary</i> the Respondent's opinion on the 45+ year-old people's activity in searching for and participating in trainings; the main areas of their activity; does the Respondent observe a decrease in the interest in the offer of trainings upon having reached a given age limit, or perhaps age does not influence the situation? What is the age limit, as far as the Respondent is concerned? the reasons and motives that govern people aged 45+ who decide to participate in trainings (<i>Determine whether the reasons include: willingness to receive new qualifications, to supplement qualifications, to change profession in the labour market</i>) the Respondent's opinion whether among people aged 45+ there exists the phenomenon of "collecting trainings", attending trainings "just in case", or attending trainings because they are free of charge. Are there any other reasons for participating in trainings? <i>If such situations occur</i>, what is their scale?
4.7	Technical and organizational resources
	<p><u>Determine:</u></p> <ul style="list-style-type: none"> the premises and equipment at the disposal of the surveyed training institution while organising trainings for people aged 45+ (own or rented conference rooms, own computer equipment, access to ICT network, library collection with educational equipment, etc.) whether, according to the Respondent, it is necessary to prepare separate technical resources during the organization of trainings exclusively aimed at people aged 45+ (<i>If yes</i>, how do these resources differ from the premises prepared for other clients?)
4.8	Effectiveness of trainings
	<p><u>Determine:</u></p> <ul style="list-style-type: none"> whether the institution monitors trainings addressed to people aged 45+ (<i>If yes</i>, what does it consist in? (<i>we are interested in the methods, tools and frequency of evaluation</i>) Does the institution measure the effectiveness of trainings, e.g. direct reaction to the training, testing the level of extending the participant's knowledge and skills by means of tests and examinations, evaluating the changes in behaviour and work results several months after the end of the training? <i>If no</i>, why?) the percentage of the participants aged 45+ who became employed directly (within 3 months) after the training the main problems faced by people aged 45+ participating in the organized trainings the chief unsatisfied training needs of people aged 45+

4.9	Planned subject matter of trainings for the older employees
	<p><u>Determine:</u></p> <ul style="list-style-type: none"> • whether the institution has recently planned any trainings exclusively aimed at the elderly people (<i>If yes, what will be the subject, area, source of financing, duration? Please make it specific that the question concerns plans for the next calendar year (2012)</i>) • whether the training institution has planned to develop training programmes focused on, among other, economic activation of people aged 45+ (<i>If yes, what will be the subject, area, source of financing, duration?</i>) • whether the institution is willing to organize other training projects aiming at economic activation of people aged 45+ • the target group of people aged 45+ of this training offer (the unemployed, jobseekers, people who undergo trainings at their own initiative, people trained by the order of other institutions and organizations) • important aspects connected with plans of launching a training designed for people aged 45+, e.g. the subject matter, costs, duration, analysis of training needs of people aged 45+ • problems/barriers connected with organization and implementation of training projects aimed at economic activation of people aged 45+
4.10	Assistance in finding employment or support after the training
	<p><u>Determine:</u></p> <ul style="list-style-type: none"> • whether the training institution supports the trained people aged 45+ in finding a job. What are the forms of support and the actions taken? • the list of partners with whom the training institution cooperates during carrying out the training projects for the benefit of people at the said age. What does this cooperation consist in? • whether other institutions and organizations in the region launch similar courses and trainings for people aged 45+ What are those institutions and organizations? What does the Respondent think of their activity? • whether the Respondent noticed if training institutions compete as regards their offers of trainings designed for people aged 45+ • whether the institutions run a database of people that underwent trainings, and the ways of making use of the database.
5.	Opinion on the actions for improving the situation of people aged 45+ in the labour market
	<p><u>Determine:</u></p> <ul style="list-style-type: none"> • whether the Respondent is familiar with legal regulations concerning economic activity of the 45+ age group. <i>You may ask the following question: Do you know legal solutions and actions aimed at improving the situation of people aged 45+ in the labour market, their economic activation, and finding a job by unemployed people aged 45+? What kind of actions can you think of? What is your opinion on them?</i> <p><i>INTERVIEWER: If the Respondent cannot think of anything, the Interviewer may refer to the list below in order to help the Respondent or show the Respondent certain regulations/solutions. However, do not ask in detail about the issues listed if the Respondent clearly states that they do not know any solutions or actions.</i></p> <ul style="list-style-type: none"> • shortening the period in which the employer pays for the employee's sickness from 33 to 14 days, • the stipulation in the Labour Code under which the employer cannot terminate the employment contract with the employee who will be in the retirement age in less than 4 years, • introduction of anti-discrimination regulations related to the problems of equal treatment in the field of employment regardless of the age, sex, disability, race, religion, etc., • introduction of regulations of the so-called outplacement; the employer that intends to dismiss at least 50 employees within the period of 3 months is required to establish, in cooperation with the relevant agency, the scope and forms of assistance to the dismissed employees (concerning agency) • exemption from paying contributions (to Labour Fund and Guaranteed Employee Benefits Fund) for the recently employed elderly workers (women – 50 years old, men – 60 years old); • the Respondent's opinion on the state's support of the actions aimed at improving the situation of people aged 45+ in the labour market. What actions should be taken in this regard according to the Respondent?

	<ul style="list-style-type: none"> • whether the Respondent heard of the governmental programme <i>Solidarity between generations. Actions aiming at increasing the economic activity among people aged 50+</i>. Is the Respondent familiar with the actions suggested in the programme <i>Solidarity between generations. Actions aiming at increasing the economic activity among people aged 50+</i>? (ask the Respondent to give examples of such actions). How does the Respondent assess these actions? • the Respondent's opinion on the changes (legislative, system and other changes) that should be introduced in this matter in the near future and in the long-term perspective • the Respondent's opinion on the levelling of the retirement age of men and women; the request for justification of the Respondent's opinion
<p>Thanking for the participation in the interview. Ending the interview.</p>	

**MODULE 7.
QUALITATIVE RESEARCH
OF ORGANIZATIONAL UNITS
OF SOCIAL WELFARE**

**INSTRUCTIONS FOR THE NON-STANDARDISED
INTERVIEW**

among

**ORGANIZATIONAL UNITS
OF SOCIAL WELFARE**

INSTRUCTIONS FOR THE INTERVIEWER

1.	<p>Introduction. Explanation of the objectives of the survey. The scope of the subjects covered in the survey.</p> <p>Good morning!</p> <p>My name is The University of Łódź in cooperation with Centrum Rozwoju Zasobów Ludzkich is currently carrying out a research project commissioned by the Ministry of Labour and Social Policy concerning the equalisation of opportunities in the labour market for people over 45 years of age, who are experiencing more and more difficulty in finding a job or maintaining a job due to their age. Your opinion on this matter will be a valuable source of information to us and it will contribute to the creation of the catalogue of actions aiming at promoting economic activity of people aged 45+.</p> <p>We will be grateful if you agree to participate in the survey.</p>
2.	<p>Presentation of the Respondent.</p> <p><u>Determine:</u></p> <ol style="list-style-type: none"> 1. The post occupied by the Respondent 2. The scope of the Respondent's responsibilities 3. The Respondent's qualifications (including occupational specialties) 4. Work experience in social welfare, including working with people aged 45+
3.	<p>Description of social welfare clients aged 45+.</p> <p><u>Determine:</u></p> <ol style="list-style-type: none"> 1. The Respondent's first associations with the topic of clients aged 45+ Ask the Responder to describe briefly (in a few sentences) people aged 45+ who receive help from OUSW. <p><i>INTERVIEWER: You should aim at the Respondent's free associations. In the event of difficulties, suggest the Respondent to provide an adjectival description. Request from the Respondent to develop the answers, justify them and give examples.</i></p> <p>If the Respondent's answers do not refer to the situation of clients aged 45+ in the labour market, ask whether their situation is similar to or different from the situation of younger clients/people. If there are any differences, what do they consist in? What do they stem from?</p> <ol style="list-style-type: none"> 2. The Responder's attitude to various opinions on social welfare clients aged 45+. Determine whether, based on the Responder's own occupational experience, the Responder agrees or disagrees with the following statements: <i>INTERVIEWER: Request from the Respondent to develop the answers, justify them and give examples.</i> <ul style="list-style-type: none"> • The clients of social welfare aged 45+ do not want to participate in trainings, learn new technologies, foreign languages etc. <i>Ask for justification.</i> • The clients of social welfare aged 45+ have exceptional knowledge and work experience. <i>Ask for justification.</i> • When they gain employment, the clients of social welfare aged 45+ are less flexible, e.g. they object when they have to stay at work longer, or have a long commute to work. <i>Ask for justification.</i> • With years, as they obtain employment, the clients of social welfare aged 45+ become more loyal workers – they have more respect for their work. <i>Ask for justification.</i> • As they obtain employment, the clients of social welfare aged 45+ become less productive than other employees, they work more slowly and make more mistakes. <i>Ask for justification.</i> • As they gain employment, the clients of social welfare aged 45+ generate more costs to be borne by the employer. <i>Ask for justification.</i> • The clients of social welfare aged 45+ generate more costs to be met by social welfare agencies. <i>Ask for justification.</i> • As they find employment, the clients of social welfare aged 45+ only want to go on retirement pension or disability pension as soon as possible. <i>Ask for justification.</i>

	<ol style="list-style-type: none"> 3. The part of all social welfare clients constituted by people aged 45+. Exemplary question: <i>If we take all the OUSW clients as 100%, what percentage is approximately constituted by people aged 45+?</i> 4. The approximate number of people aged 45+ who are the clients of OUSW. 5. Sociodemographic profile of this category of clients according to the parameters of sex, education (primary, basic, secondary, higher), age ranges (45-55, 56-65, 65 and more), occupational qualifications (having/not having an acquired profession; the kind of profession that dominates among the clients of a given OUSW aged 45+). Exemplary question: <i>If we take all the clients as 100%, what percentage is approximately constituted by (men/women, people aged 45-55, 56-65, etc.).</i> 6. The reasons for granting support – what is the first main reason for helping people aged 45+, what is the second reason, etc.; 7. The percentage constituted by people aged 45+ in different groups of typical clients: the unemployed, people with disabilities/long-lasting disease, the homeless, families with the problem of domestic violence, families with the problem of alcoholic disease, foster families, families that are helpless in terms of maintaining a household and in educational matters. Exemplary question: <i>If we take all the clients who are unemployed clients (and then one by one: clients with disabilities/long-lasting diseases, the homeless etc.) as 100%, what percentage is approximately constituted by people aged 45+?</i> <p>Find out whether and which types of dysfunction/reasons for providing support for people aged 45+ occur simultaneously, overlap (e.g. alcoholism and homelessness, unemployment and domestic violence, etc.). Find out which combination of dysfunction/reasons for providing support occurs most frequently among clients aged 45+.</p>
4.	<p>Identification of social welfare services offered to clients aged 45+ as regards the support on the labour market.</p>
	<p><u>Determine:</u></p> <ol style="list-style-type: none"> 1. The modes of assistance applied in relation to people aged 45+ as regards supporting them on the labour market. Determine which of them are used most frequently, and which less frequently. What is the Respondent's opinion on the usefulness/effectiveness of these modes? If they are not used, determine the reasons why. 2. The forms of help generally applied in relation to people aged 45+. Determine which of them are used most frequently, and which less frequently. What is the Respondent's opinion on the usefulness/effectiveness of these modes? If they are not used, determine the reasons why. 3. The form of material benefits most frequently used in relation to people aged 45+. Determine the approximate proportion of clients aged 45+ among all the clients who receive respective forms of material benefits (one by one: benefits and their types, family benefits, alimony fund, other – enumerate them). 4. The form of non-material community support that is most often offered to people aged 45+. Determine the approximate proportion of clients aged 45+ among all the clients who receive respective forms of non-material community support (one by one: economic activation department/club, community self-help centre, welfare services, special welfare services, therapy centre, rehabilitation, counselling, crisis intervention centre, support point) 5. The form of semi-stationary and stationary assistance that is most frequently offered to people aged 45+. Determine the approximate proportion of clients aged 45+ among all the clients who receive respective forms of semi-stationary and stationary assistance (one by one: daily forms of social welfare, senior clubs, voluntary service, social integration clubs).
5.	<p>Strategic planning, systemic projects, socioeconomics</p>
	<p><u>Determine:</u></p> <ol style="list-style-type: none"> 1. The characteristics of a commune from the perspective of the situation of people aged 45+ in the following categories: <ol style="list-style-type: none"> a) the offer on the labour market (whether the commune offers possibilities of employment for people aged 45+) b) the possibility of finding illegal job by people aged 45+ (whether they exist, what kind of illegal jobs one can find, whether people aged 45+ make use of these opportunities), c) transportation network (whether there exists suitable road access to other localities, including district and provincial office), d) ICT network (telephone, Internet – the clients' aged 45+ access to these utilities).

	<ol style="list-style-type: none"> 2. Determine whether in the last two years there was performed a diagnosis of the situation of people aged 45+ on the labour market in the commune. How were the analyses conducted? Did the diagnosis establish the problems and needs of the group? Enumerate these problems and needs. /why such analyses were not conducted? Has the commune adopted and implemented a strategy for solving social problems? If the commune adopted the strategy, determine whether it envisages any actions for the benefit of people aged 45+, with special focus on activation of people aged 45+, and list the kinds of these actions. Find out which of these actions are being carried out. Determine the Respondent's opinion on the interest in these actions as shown by people aged 45+. What is the Respondent's view on the effectiveness of these actions? According to the Respondent, what actions should be performed by the commune with a view to professional/social activation of people aged 45+? Why? 3. Does the surveyed organizational unit of social welfare carry out any systemic projects? Are people aged 45+ beneficiaries of these projects? What are these projects? Do they concern economic activation of people aged 45+? To what extent? What is the proportion of people aged 45+ among all beneficiaries of these projects? Which projects are the most popular among people aged 45+? Why? What problems does the Respondent notice in the implementation of projects activating people aged 45+? Can the Respondent think of a project for people aged 45+ that would be useful to implement in the commune? According to the respondent, what actions could be taken by the surveyed unit for the benefit of people aged 45+? Why? 4. Are there any actions performed in the field of socioeconomics (social integration clubs, social integration centres, welfare centres etc.) in the surveyed unit or in the neighbourhood? Do they include people aged 45+? Specify the actions. Which of them are the most attractive for people aged 45+? Why? What actions for people aged 45+ are missing in the commune? What are the problems in the performance of actions in the field of socioeconomics from the perspective of people aged 45+ (according to the Respondent)? . What changes in the functioning of socioeconomic entities (social integration centres, social integration clubs, welfare centres) would facilitate the activation of people aged 45+? 5. What are the main unsatisfied activation needs of the OUSW clients in the commune?
<p>6.</p>	<p>Cooperation of the surveyed unit within the scope of actions for the benefit of clients aged 45+</p>
	<p><u>Determine:</u></p> <ol style="list-style-type: none"> 1. Whether the surveyed unit cooperates with the labour market institutions (especially PES) within the scope of actions for the benefit of people aged 45+. What are the characteristics of cooperation (description of actions aimed at economic activation of this age group)? How is it assessed and what benefits does it bring? The problems in cooperation (substantive, organizational, legal, financial, communicational, bureaucratic, "human") that occur. <i>INTERVIEWER Ask for a detailed answer and examples.</i> What solutions would the Respondent like to implement in order to facilitate future cooperation and achieve greater effectiveness and activation of the elderly people in the labour market? Which institutions, in the Respondent's opinion, will be valuable partners for cooperation in that matter and why. 2. Whether the surveyed unit cooperates with non-public organizations (non-governmental organizations, private training agencies or job agencies) within the scope of actions for the benefit of people aged 45+. What are the characteristics of cooperation (description of actions aimed at economic activation of this age group)? How is it assessed and what benefits does it bring? The problems in cooperation (substantive, organizational, legal, financial, communicational, bureaucratic, "human") that occur. <i>INTERVIEWER Ask for a detailed answer and examples.</i> What solutions would the Respondent like to implement in order to facilitate future cooperation and achieve greater effectiveness and activation of the elderly people in the labour market? Which non-public organizations, in the Respondent's opinion, will be valuable partners for cooperation in that matter and why. 3. Whether the surveyed unit cooperates with other institutions (local, commune and district: local commune institutions such as schools, health centres and enterprises) within the scope of actions for the benefit of people aged 45+. What are the characteristics of cooperation (description of actions aimed at economic activation of this age group)? How is it assessed and what benefits does it bring? The problems in cooperation (substantive, organizational, legal, financial, communicational, bureaucratic, "human") that occur. <i>INTERVIEWER Ask for a detailed answer and examples.</i> What solutions would the Respondent like to implement in order to facilitate future cooperation and achieve greater effectiveness and activation of the elderly people in the labour market? Which local institutions, in the Respondent's opinion, will be valuable partners for cooperation in that matter and why.

	<p>4. Whether the surveyed unit cooperates with voluntary service institutions within the scope of actions for the benefit of people aged 45+. What are the characteristics of cooperation (description of actions aimed at economic activation of this age group)? How is it assessed and what benefits does it bring? What are the problems in cooperation (substantive, organisational, legal, financial, communicational, bureaucratic, "human")? <i>INTERVIEWER Ask for a detailed answer and examples.</i> What solutions would the Respondent like to implement in order to facilitate future cooperation and achieve greater effectiveness and activation of the elderly people in the labour market? If the unit does not cooperate with voluntary service, give reasons. Whether the Respondent finds such cooperation useful as regards actions for the benefit of people aged 45+.</p>
<p>7.</p>	<p>The opinions of social welfare workers and their clients on the activation of people aged 45+</p>
	<p><u>Determine:</u></p> <ol style="list-style-type: none"> The managers' and employees' attitudes to the possibility of actions taken by the social welfare institution aimed at the activation of clients aged 45+. <ul style="list-style-type: none"> The managers' attitude to the existing legal conditions concerning equalisation of prospects of people aged 45+ in the labour market. Does the present social legislation (regulations applicable to social welfare) facilitate or impede economic activation of clients aged 45+ by social welfare? What changes in regulations would facilitate economic activation of clients aged 45+? The managers' and employees' attitudes to the existing organizational conditions of the equalisation of prospects of people aged 45+ in the labour market. Does the existing organizational structure of OUSWs (region-based) facilitate the actions for economic activation of clients aged 45+? Do the existing rights and obligations of social welfare workers enable them to perform actions aimed at activation of clients aged 45+? What changes in the organization of OUSWs and the scope of obligations of social welfare employees would facilitate economic activation of clients aged 45+? The managers' and employees' attitudes to the existing financial conditions of the equalisation of prospects of people aged 45+ in the labour market. Do the existing level and form of financing OUSWs facilitate actions aimed at activation of clients aged 45+? What changes in financing OUSWs would be conducive to economic activation of clients aged 45+? The managers' and employees' attitudes to the existing conditions of education and awareness of the social welfare personnel related to equalisation of prospects of people aged 45+ in the labour market. Does the management feel prepared (knowledge, skills, experience) for economic activation of clients aged 45+? What changes in education and awareness would be conducive to economic activation of clients aged 45+? The managers' and employees' attitudes to the possibility of actions by the social welfare institution aimed at the activation of clients aged 45+ compared with the social welfare institution's opportunities to activate younger clients. Are there any differences? What do they concern? Which of them are more favourable to prospective beneficiaries? The attitude of social welfare clients aged 45+ to actions aimed at their social activation, including economic activation. Do social welfare clients aged 45+ (including 50+) expect actions aimed at activation? In what areas: professional, social, other? What actions are particularly desired by people aged 50/45? Why? Are the expectations of clients aged 45+ in this matter differ from the expectations of younger clients? What do the differences concern? What causes them? <p>Why people aged 45+ decide to participate in activation actions (social/professional)? Are people aged 45+ active when it comes to looking for and participating in various forms of economic activation? Do they signal any demands in this matter? Do they have any special common features, for instance, who is more active: men or women? What is their education or occupational skills, and what is their family situation? Can you notice the decrease in the interest in various forms of social/economic activation? Among clients aged 45+? Under what circumstances does this decrease occur (age, health, family or financial situation)? What is the attitude to economic activation of clients aged 45+ by socioeconomic entities (social integration centres, social integration clubs, welfare centres)?</p>

8.	<p>Opinion on the package of actions for improving the situation of people aged 45+ in the labour market</p> <p><u>Determine:</u></p> <ul style="list-style-type: none"> the Respondent's assessment of specific legal regulations concerning economic activity of the 45+ age group. <i>You may ask the following question:</i> Please assess whether in relation to providing equal opportunities for people aged 45+, the present legal regulations exercise impact on economic activity of the said age group, in particular on unemployed people aged 45+. Point those which, in your opinion, had the greatest effect on the situation of people aged 45+ (including 50+) in the labour market. <p><i>INTERVIEWER: If the Respondent cannot think of anything, the Interviewer may refer to the list below in order to help the Respondent or show the Respondent certain regulations/solutions. However, do not ask in detail about the issues listed if the Respondent clearly states that they do not know any solutions or actions.</i></p> <ul style="list-style-type: none"> shortening the period in which the employer pays for the employee's sickness from 33 to 14 days, the stipulation in the Labour Code under which the employer cannot terminate the employment contract with the employee who will be in the retirement age in less than 4 years, introduction of anti-discrimination regulations related to the problems of equal treatment in the field of employment regardless of the age, sex, disability, race, religion, etc., introduction of anti-discrimination regulations related to the problems of equal treatment in the field of employment regardless of the age, sex, disability, race, religion, etc., introduction of regulations of the so-called outplacement; the employer who intends to dismiss at least 50 employees within the period of 3 months is required to establish, in cooperation with the relevant agency, the scope and forms of assistance to the dismissed employees, the right of priority, i.e. the district labour agency is obliged to provide people aged 50+ with the offer of employment, other gainful activity, training, traineeship, vocational training for adults or employment in intervention works or public works within 6 months as of the day of registration, introduction of the possibility to employ jobless people aged 50+ in intervention works and public works on the more advantageous conditions compared with other groups, enrolling a person aged 50+ in a free training aimed at improving occupational qualifications and other qualifications, financing postgraduate courses for a person aged 50+, financing the costs of exams that will result in gaining certificates, diplomas, certain occupational qualifications or occupational titles as well as the costs of obtaining licences necessary to perform a given job - for a person aged 50+, the opportunity for a person aged 50+ to obtain a loan with little interest in order to cover the costs of training that will enable a given person to start or maintain employment or other gainful activity, enrolling a person aged 50+ in a traineeship (6 months maximum), during which one is entitled to a scholarship amounting to 120% of the unemployment benefit, enrolling a person aged 50+ in a 12-18 months' vocational training for adults, during which one is entitled to a scholarship amounting to 120% of the unemployment benefit, introduction of co-funding the workplace equipment up to the amount 6 times higher than the average remuneration for the employer giving job to an unemployed person aged 50+, limiting the number of people entitled to earlier retirement due to the work in special conditions or of special nature (the so-called bridging pensions), limiting the possibility of pairing economic activity and earning with receiving retirement benefit as regards people who are entitled to retirement pension but have not reached the general retirement age, introduction of the so-called nursery act that has facilitated opening nurseries and created the opportunity to establish the so-called child clubs (offering child care for 5 hours per day at maximum), as well as the opportunity to co-finance child care provided by a daily caregiver (taking care of 5 children at maximum) and a nanny, allowing for financing company kindergartens from the social benefits fund.
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Specify:

- The areas of actions aimed at improving the situation of people aged 45+ in the labour market that, in the Respondent's view, should be supported by the state. The actions that should be taken in this respect.
- Whether the Respondent heard of the governmental programme *Solidarity between generations. Actions aiming at increasing the economic activity among people aged 50+*. If yes, is the Respondent familiar with the actions suggested in the programme *Solidarity between generations. Actions aiming at increasing the economic activity among people aged 50+*?
INTERVIEWER: ask the Respondent to give examples. Determine the Respondent's opinion on these actions. Did the Respondent encounter any actions performed as part of this programme? What were they? What is the Respondent's opinion on them?
- What changes (legislative, systemic and other changes) should, in the Respondent's opinion, be introduced in this matter in the near future and in the long-term perspective?

Thanking for the interview. Ending the interview

MODULE 8.
QUALITATIVE RESEARCH
OF NON-GOVERNMENTAL ORGANIZATIONS

**SCENARIO OF THE INDIVIDUAL
IN-DEPTH INTERVIEW (IDI)**

among

NON-GOVERNMENTAL ORGANIZATIONS

INSTRUCTIONS FOR THE INTERVIEWER

1.	<p>Introduction. Explanation of the objectives of the survey. The scope of the subjects covered in the survey.</p> <p>Good morning!</p> <p>My name is The University of Łódź in cooperation with Centrum Rozwoju Zasobów Ludzkich is currently carrying out a research project commissioned by the Ministry of Labour and Social Policy concerning the equalisation of opportunities in the labour market for people over 45 years of age, who are experiencing more and more difficulty in finding a job or maintaining a job due to their age. Your opinion on this matter will be a valuable source of information to us and it will contribute to the creation of the catalogue of actions aiming at promoting economic activity of people aged 45+.</p> <p>We will be grateful if you agree to participate in the survey.</p>
2.	<p>Presentation of the Respondent</p> <p><u>Determine:</u></p> <ul style="list-style-type: none"> • the scope of tasks performed in the Respondent's organization • the scope of tasks for which the Respondent is responsible. • how long the Respondent has been responsible for these tasks
3.	<p>Specifying the characteristics of the non-governmental organization <i>Ask for the statute of the organization</i></p> <p><u>Determine:</u></p> <ul style="list-style-type: none"> • the scope of the organization's operation at the following levels: commune/district/region/country • the type of the unit, forms of proprietorship, location, duration on the market, profile of specialty (e.g. target groups at which the organization aims its activity); <i>the Respondent may use the statute of the organization in order to describe the objectives;</i> • size (potential of the unit) – the number of permanent employees, the number of external employees cooperating with the organization, and forms of such cooperation • the position of people aged 45+ in the organization (their proportion in the overall number of employees, the posts they hold, the mode of cooperation); <i>it is necessary to specify <u>the number of volunteers aged 45+ and the scope of their actions</u></i> • the Respondent's assessment of the work performed by people aged 45+ in the organization. Does the Respondent notice any differences in the work performed by people aged 45+ and younger employees? How does the Respondent assess the work of people aged 45+ in terms of their conscientiousness, learning speed, efficiency etc.?
4.	<p>The organization's actions aimed at activation of people aged 45+ <i>Ask the Respondent to differentiate between the actions aimed at seniors and actions addressed to people aged 45-59/60</i></p> <p><u>Determine:</u></p> <ul style="list-style-type: none"> • whether in the last 2 years the organization implemented tasks/projects designed for people aged 45+; <i>if yes, what tasks/projects were they? What did they consist in? How were they financed? What was their form (e.g. training, counselling, integrative, other)? What is the Respondent's opinion on these actions?</i> • the projects/actions listed by the Respondent that were the most „successful”. <i>Ask the Respondent to justify the opinion. And which were the least valuable? Ask the Respondent to justify the opinion.</i> • whether the actions taken by the organization include actions aimed at <u>economic activation of people aged 45+</u>; <i>if yes, what are these actions? What do they consist in? What tools are used for their implementation? How are they financed? How does the Respondent assess them: are they useful/effective for economic activation of people aged 45+? What are the main problems that occur during implementation (legal, organizational, financial, substantive, problems related to lack of competence and the organizers' attitude, problems connected with lack of interest and involvement of beneficiaries)?</i> • the Respondent's opinion on the actions taken by the organizations with a view to economic activation of people aged 45+ compared with younger people. Are there any differences? What do they consist in?

	<p><i>If the organization undertakes or has undertaken projects for the elderly people, obtain the information about them:</i></p> <ul style="list-style-type: none"> • age groups at whom the organization most often targets the projects activating the elderly people, e.g. people of immobile productive age, seniors; the main problems that the organization encounters while carrying out the projects aimed at people aged 45+, including in particular: whether the organization encounters financial, legal or organizational barriers; whether the lack of interest among people aged 45+ creates a barrier for the launched actions; whether the employees and volunteers of the organization are prepared for performing actions for the benefit of people aged 45+ <p><i>From all the organizations we obtain the following information:</i></p> <ul style="list-style-type: none"> • what are some other projects aimed at people aged 45+ that the organization would like to undertake in the future; what would the actions related to that projects consist in; how the Respondent justifies the choice; • suggestions of solutions that would improve the organization's activity in the field of activation of people aged 45+ • the opinion whether non-governmental organization should carry out projects concerning <u>economic</u> activation of people aged 45+; <i>it is important that the Respondent gives justification of the answer, either positive or negative (that is: why they should or why they should not)</i>
<p>5.</p>	<p>Diagnosis of the situation of people aged 45+ (including 50+) in the local community</p> <p><i>Ask the Respondent to differentiate between the actions aimed at seniors and actions addressed to people aged 45-59/60</i></p>
	<p><u>Determine:</u></p> <ul style="list-style-type: none"> • the characteristics of the commune in which the organization operates from the perspective of the situation of people aged 45+ in the following categories: <ul style="list-style-type: none"> a) the offer on the labour market (whether the commune offers possibilities of employment for people aged 45+) b) the possibility of finding illegal job by people aged 45+ (whether they exist, what kind of illegal jobs one can find, whether people aged 45+ make use of these opportunities), c) transportation network (whether there exists suitable road access to other localities, including district and provincial offices), d) ICT network (telephone, Internet – the clients' aged 45+ access to these utilities). • the Respondent's first associations with the issue of employees aged 45+ • strengths and weaknesses of employees aged 45+ (including 50+) • opinions and stereotypes concerning people aged 45+ in the labour market (ask the Respondent to provide examples) • assessment of knowledge, skills, and personal features of people aged 45+. Which of them may be classified as strengths and which as weaknesses, taking into consideration their situation in the labour market? • the Respondent's opinion on the age limit above which older employees become unattractive to the employer, both the present and prospective one What precisely is this limit? <i>Ask for justification</i> • whether the organization conducted a diagnosis of the situation of people aged 45+ in the area where the organization operates, focusing on the qualifying and occupational needs of those people and on the needs of employers. <i>If yes, are the results of the diagnosis reflected in the actions performed by the organization for the benefit of people aged 45+? If no, does the Respondent think that such a diagnosis is necessary for the activity of the organization? Determine: the reasons for which it is necessary or unnecessary</i> the sources from which the organization gets information about people at whom it aims its actions • the Respondent's views on the social and economic activity of people aged 45+ (are they really interested in finding a job, do they launch any actions for the benefit of their community? <i>ask the Respondent to elaborate on the kinds of these actions</i>); whether the Respondent notices the decrease in such activity in people who have reached a certain age limit, or perhaps the age is not significant? What is the age limit, as far as the Respondent is concerned? • the actions for economic activation of people aged 45+ that are carried out in the city/ commune where the Respondent's organization runs its activity; <i>if the Respondent knows such actions, find out who performs them and what they consist in</i> • other projects activating people aged 45+ that should be implemented at the local level in the future Who should undertake them?

	<ul style="list-style-type: none"> • whether the local level is the area of operation of socioeconomic entities, i.e. welfare centres, social integration centres and clubs, vocational development centres, foundations and associations that run business activity; <i>if yes</i>, do they carry out projects aimed at economic activation of people aged 45+? What is the Respondent's opinion on the actions for the benefit of people aged 45+ undertaken by socioeconomic entities in the commune/city? Which ones of them does the Respondent find the most interesting? • whether the Respondent knows the expectations of people aged 45+ who live in the area of operation of the organizations that aim at activation of those people; <i>if yes</i>, what are these expectations? How does the Respondent learn about them? Do the people aged 45+ who expect the non-governmental organization to perform activation actions have anything in common? Are they rather women or men? What is their family, occupational and financial situation? What are their qualifications and education? • the specific actions that people aged 45+ expect from the organization, e.g. social and economic activation, social integration, care. Are there any differences within the 45+ age group?
6.	<p>Opinion on the system of actions for improving the situation of people aged 45+ in the labour market</p>
	<p><u>Determine:</u></p> <ul style="list-style-type: none"> • whether the Respondent is familiar with legal regulations concerning economic activity of the 45+ age group. <i>You may ask the following question:</i> Do you know legal solutions and actions aimed at improving the situation of people aged 45+ in the labour market, their economic activation, and finding a job by unemployed people aged 45+? What kind of actions can you think of? What is your opinion about them? <p><i>INTERVIEWER: If the Respondent cannot think of anything, the Interviewer may refer to the list below in order to help the Respondent or show the Respondent certain regulations/solutions. However, do not ask in detail about the issues listed if the Respondent clearly states that they do not know any solutions or actions.</i></p> <ul style="list-style-type: none"> • shortening the period in which the employer pays for the employee's sickness from 33 to 14 days, • the stipulation in the Labour Code under which the employer cannot terminate the employment contract with the employee who will be in the retirement age in less than 4 years, • introduction of anti-discrimination regulations related to the problems of equal treatment in the field of employment regardless of the age, sex, disability, race, religion, etc., • introduction of anti-discrimination regulations related to the problems of equal treatment in the field of employment regardless of the age, sex, disability, race, religion, etc., • introduction of regulations of the so-called outplacement; the employer who intends to dismiss at least 50 employees within the period of 3 months is required to establish, in cooperation with the relevant agency, the scope and forms of assistance to the dismissed employees, • the right of priority, i.e. the district labour agency is obliged to provide people aged 50+ with the offer of employment, other gainful activity, training, traineeship, vocational training for adults or employment in intervention works or public works within 6 months as of the day of registration, • introduction of the possibility to employ jobless people aged 50+ in intervention works and public works on the more advantageous conditions compared with other groups, • enrolling a person aged 50+ in a free training aimed at improving occupational qualifications and other qualifications, • financing postgraduate courses for a person aged 50+, • financing the costs of exams that will result in gaining certificates, diplomas, certain occupational qualifications or occupational titles as well as the costs of obtaining licences necessary to perform a given job - for a person aged 50+, • the opportunity for a person aged 50+ to obtain a loan with little interest in order to cover the costs of training that will enable a given person to start or maintain employment or other gainful activity, • enrolling a person aged 50+ in a traineeship (6 months maximum), during which one is entitled to a scholarship amounting to 120% of the unemployment benefit, • enrolling a person aged 50+ in a 12-18 months' vocational training for adults, during which one is entitled to a scholarship amounting to 120% of the unemployment benefit, • introduction of co-funding the workplace equipment up to the amount 6 times higher than the average remuneration for the employer giving job to an unemployed person aged 50+, • limiting the number of people entitled to earlier retirement due to the work in special conditions or of special nature (the so-called bridging pensions),

	<ul style="list-style-type: none"> • limiting the possibility of pairing economic activity and earning with receiving retirement benefit as regards people who are entitled to retirement pension but have not reached the general retirement age, • introduction of the so-called nursery act that has facilitated opening nurseries and created the opportunity to establish the so-called child clubs (offering child care for 5 hours per day at maximum), as well as the opportunity to co-finance child care provided by a daily caregiver (taking care of 5 children at maximum) and a nanny, • allowing for financing company kindergartens from the social benefits fund. <p><u>Determine:</u></p> <ul style="list-style-type: none"> • what changes should be introduced in the near future and in the long-term perspective in order to improve the situation of people aged 45+ in the labour market, as far as the Respondent is concerned; • the Respondent's opinion on the levelling of the retirement age of men and women; the request for justification of the Respondent's opinion • the Respondent's opinion on the state's support of the actions aimed at improving the situation of people aged 45+ in the labour market; the actions that should be taken in this regard according to the Respondent, • whether the Respondent heard of the government programme <i>Solidarity between generations. Actions aiming at increasing the economic activity among people aged 50+</i>. Is the Respondent familiar with the actions suggested in the programme <i>Solidarity between generations. Actions aiming at increasing the economic activity among people aged 50+</i>? (ask the Respondent to provide the examples of such actions). How does the Respondent assess these actions?
7.	<p>Cooperation between the non-governmental organization and other entities in the field of activation of people aged 45+</p>
	<p><u>Determine:</u></p> <ul style="list-style-type: none"> • whether the organization cooperates with other organizations/institutions on implementing projects for the benefit of people aged 45+; if yes, enumerate these organizations (other NGOs, organizational units of social welfare, district labour agencies, training institutions, job agencies etc.) <p><i>The next questions concern each of the entities listed by the Respondent that cooperates with the organization on the projects for the benefit of people aged 45+. Obtain the following information:</i></p> <ul style="list-style-type: none"> • a detailed description of the program on which the entities cooperate; time of completion; form of financing; kind of actions taken as part of the program; benefits stemming from the cooperation; barriers and problems that arise during cooperation (they can be financial, legal and organizational barriers, barriers related to competences of people taking part in cooperation or barriers related to the attitude of partners etc.); evaluation of these actions. <p><u>Determine:</u></p> <ul style="list-style-type: none"> • whether the organization performs public services ordered by the local government and aimed at people aged 45+; <i>if yes</i>, what do these services consist in? What are their forms and what is their scope? What is the Respondent's opinion on them, taking into consideration the benefits and barriers that are encountered?
	<p>Thanking for the interview. Ending the interview</p>

**MODULES 3 – 8.
QUALITATIVE RESEARCH**

INSTRUCTIONS FOR THE INTERVIEWER – QUALITATIVE STUDIES

1. Procedure

- ✓ Arrangement of the interview via telephone – identification of the substantive respondent (if two, the so-called key respondents are defined – volitional choice). Scheduling the interview;
- ✓ Direct arrangement of the interview;
- ✓ Informing the respondent on the anonymous and cognitive character of the interview;
- ✓ Informing the respondent that the interview will be registered on a voice recorder. In the event of the respondent's refusal, stop the interview and substitute the individual, as there is no guarantee that the interview will be conducted with a due diligence, and that a proper analysis of the content will be possible;
- ✓ Determining the goal of the survey as searching for the answer to the problems connected with the respondent's knowledge and competence. Referring to the personal experience of the respondent as a representative of a specific occupational environment, and as a person for whom the results of the survey are dedicated; an interlocutor with valuable qualifications and expertise;
- ✓ **BEFORE THE INTERVIEW BEGINS, THE INTERVIEWER FILLS IN THE HEADING OF THE SURVEY RECORD SHEET;**
- ✓ Check-up of recording devices (battery/accumulator, making a sample voice recording and playing it)

2. Questioning procedure

- ✓ You should seek to obtain exhaustive answers to the questions;
- ✓ Casual and incomplete answers demand the interviewer's interference asking additional questions or once again raising the topic of the question;
- ✓ **IN THE EVENT OF INTERRUPTION OF THE INTERVIEW, SCHEDULE AN ADDITIONAL DATE AT WHICH THE INTERVIEW WILL BE COMPLETED. IN THE CASE OF INABILITY TO SCHEDULE SUCH A DATE, SUBSTITUTE THE RESPONDENT;**
- ✓ **IF SOME PIECES OF INFORMATION ARE KNOWN BY A PERSON OTHER THAN THE INTERVIEWED RESPONDENT, TRY TO ESTABLISH CONTACT WITH THAT PERSON. IF IT IS IMPOSSIBLE TO ESTABLISH DIRECT CONTACT WITH THE SECOND KEY RESPONDENT, OBTAIN THE PERSON'S CONTACT DETAILS (TELEPHONE NUMBER OR E-MAIL ADDRESS) AND COMPLETE THE DATA BY MEANS OF INDIRECT CONTACT;**
- ✓ DO NOT SUGGESTS THE ANSWERS TO THE RESPONDENTS BY GIVING EXAMPLES OF GIVEN EVENTS OR SITUATIONS;
- ✓ ANY INTERFERENCE BY THE INTERVIEWER, I.E. ASKING ADDITIONAL QUESTIONS IN ORDER TO OBTAIN EXHAUSTIVE ANSWERS, MUST BE INCLUDED IN THE TRANSCRIPT;
- ✓ Individual in-depth interview (IDI) is a non-standardised interview; therefore, you should retain the balance between questions included in the scenario and the respondent's digressions;
- ✓ Individual in-depth interview (IDI) requires stimulating the respondent by means of the so-called contact questions, e.g. whether? how? why? when? in what situations?;
- ✓ **THE INTERVIEWER PERFORMS AN IMPORTANT FUNCTION – OF A HEARER, WHILE THE RESPONDENT SHOULD FEEL COMFORTABLE DURING THE CONVERSATION**

- ✓ In the event that the respondent ask the interviewer about the meaning of a given term, the interviewer should encourage the respondent to explain the term without any assistance and create its definition autonomously;
- ✓ Non-verbal and verbal signs of the respondent's weariness cannot force the interviewer to accelerate the procedure or skip any questions;
- ✓ The questions that the respondent **DEFINITELY REFUSES TO ANSWER MUST BE RECORDED AND INCLUDED IN THE TRANSCRIPT.**

MODULE 9.
EXPERTS' PANEL DISCUSSION

Scenario of the experts' panel discussion

- I. Welcoming the participants of the experts' panel discussion by the Project Manager of the Contractor;
- II. Organizational and technical information conveyed to the participants by the moderator;
- III. Discussion organized in several thematic blocks:
 1. **Character and features of the present situation of people aged 45+ on the local labour market (an attempt of analysis).** This thematic block includes a presentation of the results of the research concerning the analysis of people aged 45+ in the labour market, as well as a presentation of a preliminary diagnosis of the results of the analysis of people aged 45+ in the labour market. The moderator should lead the discussion in this thematic block in such a way as to touch upon the following questions/issues:
 - How do you think the employers assess knowledge, skills and personal features of people aged 45+? Which of them can be qualified as the so called strengths, and which should be considered weaknesses, given their situation in the labour market? What stereotype of an employee 45+ dominates among Polish employers? - *perceptual map*;
 - What is your general opinion on the situation of people aged 45+ (including 50+) in Poland? (issues related to economy, health, access to education, trainings etc.);
 - What is your opinion on the co-occurrence of discriminating factors, e.g. age and sex, in the labour market?;
 - What are the main problems faced by people aged 45+ domiciled in Poland? Is the situation of people aged 45+ subject to regionalisation? Are there any differences within the 45+ age group? What are the basic differentiation factors of the situation of people aged 45+? What is the situation of people aged 45+ in the EU countries other than Poland?;
 - A roundup discussion concerning the result and recommendations for the diagnosis of people aged 45+ in the labour market.

This thematic block has been scheduled to last 30 minutes.

2. **Actions for economic activation of people aged 45+. The role and part played by the respective entities. The exchange of the best practices.** The thematic block has the following aims:
 - A. To identify the areas of assistance to people aged 45+;
 - B. To evaluate public entities in terms of their actions for the benefit of people aged 45+;
 - C. To establish best practices of institutions;
 - D. To evaluate the programme *Solidarity between generations. Actions aiming at increasing the economic activity among people aged 50+*;
 - E. To specify European solutions applied to the actions for the benefit of people aged 45+;
 - F. To assess the effectiveness of the implemented projects;
 - A. G. To analyse the results and conclusions related to the actions for the benefit of people aged 45+.

In this thematic block, the Moderator should aim at focusing the discussion on the following questions:

- Do public entities carry out actions for the benefit of people aged 45+ (including 50+)? How do you assess their actions in terms of effectiveness in the local and regional labour market?;
- Enumerate and describe best institutional practices for economic activation of people aged 45+;
- What is your opinion on the governmental programme *Solidarity between generations. Actions aiming at increasing the economic activity among people aged 50+*? What are the actions realised as part of this programme that you are familiar with? How do you assess them?;
- What is the situation of people aged 45+ in the EU countries other than Poland? What actions are undertaken in the EU countries with a view to economic activation of people aged 45+ in the labour market? Which of these actions are implemented in Poland? Which of these actions can be implemented in Poland, taking into consideration the characteristics of Polish labour market?;
- How do you assess the effectiveness of the undertaken projects concerning economic activation of people aged 45+?

This thematic block is closed with a roundup discussion of the conclusions and recommendations concerning the actions aiming at economic activation of people aged 45+. This thematic block has been scheduled to last 60 minutes.

3. Extending the period of economic activity of women and men – identifying the main barriers. Chances and risks. The goals of this thematic block have been defined as follows:

- A. To identify the main barriers for extending the period of economic activity of women and men;
- B. To describe and evaluate the sociodemographic context influencing the possibility of extending the period of economic activity of men and women;
- C. To establish preferences/incentives that would encourage employees and employers to extend the period of economic activity of people aged 45+;
- D. To hear the opinions of the possibility to reduce the exclusion of people aged 45+ from the labour market.

In this thematic block, the Moderator should aim at focusing the discussion on the following questions:

- As you are the experts in the field, what is your attitude to actions aiming at extending the period of economic activity of Poles aged 45+? Do you think that the demographic and economic justification presented by the government is valid?;
- What do you think will be the effects of extending the period of economic activity of Poles aged 45+ on the employment of women, generation replacement on the market and health burdens in professions that require physical effort?;
- What preferences should be used in order to encourage employees and employers to extend economic activity of people aged 45+? Is the extension of economic activity of men and women advantageous to employers?;
- Do you think that the extension of economic activity of people aged 45+ will reduce the exclusion of people aged 45+ from the labour market?

This thematic block will end with a roundup discussion on the conclusions and recommendations concerning the extension of the period of professional activity of men and women.

This thematic block has been scheduled to last 45 minutes.

4. Popularisation and promotion of people aged 45+ in the labour market – the possible actions, their scope, costs and potential effectiveness. People aged 45+ in the labour market – a prognosis. The goals of this thematic block have been defined as follows:

- A. To learn the opinions on the effectiveness of promotional campaigns aimed at popularisation and promotion of people aged 45+ in the labour market;
- B. To evaluate the actions undertaken by public institutions that lead to changing stereotypical attitudes of employers and employees;
- C. To make a prognosis concerning changes in the labour market – scenario in a 5-year interval.

In this thematic block, the Moderator should aim at focusing the discussion on the following questions:

- Will the standard promotional campaigns (engaging occupational media agencies) be effective for popularisation and promotion of people aged 45+ in the labour market?;
- What cultural, economic and legislative changes will influence the promotion of people aged 45+ in the labour market?;
- What actions undertaken by institutions may change the employers' stereotypical attitudes to people aged 45+? Assess their scope, costs and potential effectiveness;
- What actions undertaken by public institutions may change the employees' stereotypical attitudes to extending the period of economic activity of people aged 45+? Assess their scope, costs and potential effectiveness;
- What scenario related to economic activation of people aged 45+ is the most probable within the next 5 years?

This thematic block is closed by a roundup discussion concerning the result and recommendations for popularisation and promotion of people aged 45+ in the labour market. This thematic block has been scheduled to last 90 minutes.

IV. Conclusions. The goal of this thematic block is to establish coherent conclusions and recommendations.

V. The end. This thematic block is devoted to questions and suggestions of the participants of the experts' panel discussion concerning the subject matter of the survey.

This thematic block has been scheduled to last 15 minutes.

The experts' panel discussion will end with thanking for participation in the discussion and sharing the knowledge and experience related to the research.