



Active Ageing  
through Social Partnership  
and Industrial Relations in Europe.  
National Report  
for Poland

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## **Introduction**

At the core of the ASPIRE project lies the assumption that active aging can also be developed through social partnerships and industrial relation. Interestingly, European governments have been moving from an early retirement to an active aging model at least from the turn of the century. The latter stresses the need to remove barriers connected with the job change, lifelong learning and measures taken by employers targeted at facilitating fulfilling combined family and professional responsibilities, building healthy workplace as well as career and retirement planning. What should be emphasised here is that employers, but also social partners, i.e. trade unions, play a crucial role in this transformation.

The research studies in the above-mentioned field existing in Poland were limited either to case analysis or to determining the frequency of using particular age management instruments. However, there are no meta-analyses regarding the social partners' approach to promote both active aging and sustainable work and simultaneously encompassing the content of sectoral and collective labour agreements. Their attitudes and roles in implementing the active aging idea in the Polish reality compared to three other European countries - Great Britain, Italy and Spain - will be analysed in the project.

The following report describes industrial relations' historical foundations and their present shape in Poland, the pension system, demographic dimensions of aging, age management results and review of trade union activities. It will constitute a starting point for the further research activities in the ASPIRE project.

## **Industrial relations**

### **Industrial relations in Poland – A handful of history**

The relations between the employers and the employees, referred as industrial relations, constituted an important part of social policy in the Second Polish Republic (1918–1939). Because of 123-year heritage of partitions, earlier regulations, legally binding in this area in Poland, were very diverse. To put it in broad terms, the most advanced measures of the social policy were employed during Prussian partitioning. Unification of the pre-war measures constituted a huge challenge for the young Polish state unit. Particular difficulty was connected with the issue of harmonization of the workers' legislation, which is well illustrated by an excerpt from one of the analyses of Ministry of Labor and Social Policy from 1919: "By inheriting the labor law from three partitionings, the Republic of Poland faces by the same chaos that is beyond imagination" (Grata, 2013, p.20).

The Second Polish Republic has achieved significant success in area to create a coherent legal framework, including social issues. The Ministry of Labor and Social Welfare had started preparatory courses for the future labor inspectors and announced a decree of the Provisional Head of State (an 8-hour working day and a 46-hour working week). In 1919 regulations pertaining to resolution of collective disputes between employers and agricultural workers were adopted and decree on provisional regulations concerning employees labor unions was published. It had introduced a liberal principle of labor unions forming. The decree had also introduced an

important principle in accordance with which the unions represented all the employees, and not only those who had registered with them (Organisciak, 2009, p.248).

A great economic crisis (in Poland 1929-1935) had brought with it a partial move away from the labor law regulations which were so far beneficial for the employees (Kowalski, Matera, 2017). The "English Saturdays" were eliminated, and the two extra hours were not additionally paid. Holidays, for which the employee was not paid, started to be also included in the leave. From 1932 the state administration bodies gained the right to review the whole documentation of the union's authorities. An important improvement to the already existing measures was the president's decree on extraordinary dispute adjudication boards concerned with resolution of collective disputes between employers and industry and trade workers. The scope of operation of those boards was however limited to disputes which could have an influence on the economic security of the state. The years immediately before the outbreak of the Second World War constituted a period of systematic ordering of legislative regulations (Kowalski, Matera, 2017). Despite the lack of a unified labor code, and the resulting fragmentation of regulations pertaining to workers' issues as well as impotence of some of the institutions, achievements of the Second Polish Republic in this area are of high value. The adopted measures were defined by the International Labor Organization (ILO).

The characteristic feature of the new authorities' politics in the area of industrial relations was the method of introducing changes resulting in centralization on the level of institution and in the process of decision making. The most important feature that distinguished the character of the Polish People's Republic authorities system was its duality and diluted responsibility connected to it. The actual power center was the party and its bodies (Kowalski, Matera, 2017).

The changes in the area of labor protection were fast paced. In connection with abandonment of capitalistic state model the need to "play a lawyer in the name of workmen's interests towards the state of workmen and peasants" was to become obsolete (Zielinski, 1951, p.20). The controlling functions of the labor inspection were gradually limited, and its role was undergoing a progressing marginalization. From 1950 it was incorporated into the Boards of the People's Councils. An example of imported soviet measures was formation in the same year of the so called social labor inspectorate, lacking however effective tools which could help exert an influence on improvement of work conditions in a country undergoing an intensive industrialization. The phenomenon of socialist work competition was copied in a similar way - to maximize the work's effects, but in fact resulted in an effect completely opposite to the intended.

As a part of the "Thaw" after 1956 there were broad discussions on extending the role of workers' self-government - it was to be a reference to the Yugoslavian model. Germs of this type of structures started to come into existence during the "Polish October" when in some of the workplaces bottom-up workers' councils emerged. The proposals to create a countrywide structure were successfully hampered by Wladyslaw Gomulka, who was scared of the party losing the control over spontaneously organizing workers' movement. Despite purposeful actions intended to weaken the workers power in the end it was precisely this group that brought about political turning points in the country: in December of 1970, in July of 1976, and in August of 1980. As the result of the August agreements, an Independent Self-governing Labor Union "Solidarity" was formed,

which in fact was a countrywide social movement. Among the 21 postulates of "Solidarity" among others there were the following demands: guarantee of the right to strike, introduction of all work-free Saturdays, introduction of a three-year long maternity leave. In a country ruled by the communist nomenklatura this demand could not be implemented. Introduction of the martial law (1981), banning of labor unions and interning of many of "Solidarity" members in the time of the martial law spoke loudly of the ruling camp's lack of good intentions. In 1984 a licensed All-Poland Alliance of Trade Unions (OPZZ) was formed. Its role was strengthened through the principle of legality that banned formation of more than one trade union in a workplace. Sporadically, more to lend credence to its operations than in hope of achieving anything, OPZZ submitted demands inconvenient for the government, eg. the postulate pertaining to paying out of compensations for the striking staffs (Kowalski, Matera, 2017).

The protests were an important reason for the communists to enter into the talks with the representatives of the officially banned "Solidarity", which in practice took form of the Round Table Talks. A new stage of the history of Poland has begun, also in the area of industrial relations – privatization, introduction of pluralism principle, the labor code guaranteeing.

### **Industrial relations in Poland – latest changes**

The present state of contemporary collective labor relations has been formed in 1991 which also marked the beginning of systematic transformation. The first three laws were then introduced: trade unions law, employers organizations law as well as collective dispute resolving law. Polish experience regarding the presentation of employees rights is dominated by trade unions. Since 2006 in addition to trade unions, the reality of collective labor relations has been enriched by a non-union form of employee organizations in the form of workers' councils.

Two years ago, on the 24<sup>th</sup> of July 2015 the law on the Council of Social Dialogue and other institutions of social dialogue was established. It was aimed to strengthen the tripartite dialogue as well as social partners such as organization of employers and trade unions, also their participation in legislative process. Under this law, the obligation to consult draft legal acts with the Council has been introduced. Unfortunately it is not always respected. It happens that projects are either never consulted with the Council or they are only consulted when at the same time they are already proceeded by the Parliament. Negative examples could be presented here and it also seems that the government is avoiding possible dispute with its representatives ignoring the Council sittings. Such an action is against the principles of dialogue, and it also disregards the social partners. There were hope and expectations from all sides two years ago yet the reality verified them negatively <http://pracodawcyrp.pl/aktualnosci/dwa-lata-rady-dialogu-spolecznego-zawiedziane-nadzieje> (24/07/2017).

The goals of the Council are: (1) providing the conditions for the social-economic development and increasing the competitiveness of Polish economy and social cohesion; (2) implementation of the participation and social solidarity rule in employment relations; (3) supporting the quality of formulating and implementing the policies

and social-economic strategies, as well as building around them a social agreement through a transparent, essential and regular dialogue of employees, employers and government side; (4) supporting the implementation of social dialogue at all levels of local authorities units.

The Council is made of representatives of: government, representative trade unions and employers unions. The government side is represented by ministers, vice-ministers and under-secretaries of state of the following ministries: Ministry of Family, Labour and Social Policy, Ministry of National Education, Ministry of Development and Finance and Ministry of Health. The Council is also made up of the representative employers unions:

- Employers of Poland
- The Lewiatan Confederation
- Polish Craft Association
- Business Centre Club

Among the members there are also representative union organizations like:

- The Independent and Self-Governing Trade Union Solidarność
- All-Poland Alliance of Trade Unions
- The Trade Unions Forum (<http://rds.gov.pl/> (June 2017))

Appointment these bodies for Council members constitutes them as the main players in industrial relations in Poland.

Trade unions in Poland are currently facing great challenges, yet the post-communist heritage limits their ability to act. Moreover, they are strongly fragmented due to their organizational structure and ideological divisions. Their main negotiation area is the workplace and collective labour agreements generally cease to exist. At the national level, though, the three large trade union organizations primarily intend to influence legislation, for instance directly in the field of labor law, but also within the realm of social policy and labor market policy (Trappmann, 2012, p. 4).

In the field of collective agreement policy, strengthening the autonomous dialogue between employers and trade unions – without government participation, poses the greatest challenge. For this purpose, the principle of employers' representativeness should first be thoroughly changed. Until now, everyone with the right to hire and fire as well as to determine working conditions is considered to be an employer – nevertheless, only one tenth of employers are represented by federations (Trappmann, 2012, p. 26)

Trade unions are now faced with the difficult task of shifting from the politics centered around representing interests on the ideological axis of Catholicism – laicism and opposition – which supports the system to conducting a policy of representing interests within the realm of the conflict between the labor and the capital instead (Trappmann, 2012, p.28).

## Demographic dimensions

### Demographic dimensions in Poland

Poland has experienced significant demographic changes over the past 25 years. Five most crucial dimensions are: changes in the range of fertility, mortality, age structure change, change of migration pattern, as well as concentration of population in selected subregions of Poland which in turn results from depopulation.

In case of reproductive changes, the long-term survival of the fertility rate is observed at a level well below the expected one. From 1990 the replacement rate of generations has not been provided whereas fertility below the 1.5 border has been continuously noted from 1998, with temporary values below 1.3 (between the years 2001-2006 and again from 2011). If the coefficient is 1.5 in the long run, population decreases by about  $\frac{1}{4}$  during a course of one generation, whereas if the factor reaches 1.3, the continuation of such a value over the course of a generation would reduce the population by  $\frac{1}{3}$ . At the same time, after twenty-five years of stagnation (in case of men) or slow positive changes (in case of women), there has been observed a dynamic and long-lasting reduction in mortality since 1992 being a sign of improvement of Polish population health. The gap between Poland and the Western European countries is slowly decreasing though there is still a long delay noticeable. At the same time the decrease of mortality strengthens the process of aging which by itself would take place anyway due to the phase of compensation which naturally happened in Poland in the first years following the end of second world war. People born in the so called baby boom years (1946-1959) are gradually turning 60-70 years old now which will result in a significant change in age-profile of Polish population. Lasting subreplacement fertility means less and less young workers are entering labour market and substituting for the retirees. Workforce is decreasing and ageing as a consequence.

Another important issue are migrations which are extremely difficult to be measured due to imperfect system of recording both internal and external migrations. In case of foreign migration, approximately 2.5 million Poles live outside their country for more than 3 months and about 1.4-1.5 million over one year. Research conducted in Great Britain shows that in the last years the so called post-access migrations of Poles - which were expected to be a temporary solution for securing funds for later better life in Poland - are becoming permanent ones. Moreover, changes take place in the age structure of Polish population since immigrants are relatively young. In the last three years lacks were compensated partly thanks to the big influx from Ukraine which was favored by fairly liberal system of work permits in Poland and the uneasy political and economic situation in Ukraine. However, this inflow may soon end as a result of newly introduced visa-free entry to Europe for all Ukrainians (June 2017). Nevertheless approximately 4-5% of workforce in Poland are Ukrainian workers now and in many subregions (esp. the biggest cities) the percentage is higher. As a consequence many companies base their recruitment strategies on the Ukrainian workers (esp. in case of unskilled workers).

In case of migration, it is also worth noticing that the young are eager to move to some of the largest and most attractive cities in Poland (usually capitals of voivodships) which leads to further drainage of peripheral

workforce. As a result, there is a concentration of population in more than a dozen cities, as metropolitan areas play an increasingly important role in suburbanization. The rest of the country suffers from depopulation. Depopulation is observed in rural communities in the last fifty years whilst the last twenty years has been the time for small and middle cities to depopulate. These changes lead to further aging of labor resources in depopulated areas, increasing the problems related to the occupational activity of the 50+ employees inhabiting these areas. (Szukalski, 2017).

Mass migration, workforce ageing, and decrease in numbers of well skilled workers are the most important demographic factors affecting observed changes in employers' attitude to HRM. Starting with international big companies more and more employers are aware of emerging recruitment problems resulted in interest in some internal practices and regulations enhancing employee-employer relations.

## **Dependency ratio**

Dependency ratio is defined as the number of people at non-working age per 100 people at working age. In the analysis of the influence of the population ageing also partial indicators are used – young age dependency ratio (number of people aged 0-14 per 100 people aged 15-64) and old age dependency ratio (number of people aged 65 or more per 100 people aged 15-64). The dependency ratio is currently higher for the population of the EU-27 inhabitants at the pre-working age than post-working age. This applies to all countries of the European Union. In 2015 in Poland, the dependency ratio is one of the lowest in the EU (approx. 44 people at nonworking age per 100 at working age, with almost twice lower old dependency ratio – approx. 22) (Warwas, Wiktorowicz, Woszczyk (eds), 2017, p. 21). Nevertheless, the forecasts are pessimistic. According to the variant without migration of the Eurostat population projection, it is expected that in the European Union there will be 86 people on average from outside the group of working age per 100 people at that age (15-64 yrs.), and mainly it will be people at post-working age (61). In Poland these indicators are projected on the level 89 (for total nonworking people) and 67 (old dependency ratio). Quite extraordinary is the projected change of Poland's position (from last but one to the 11th – in 2060, which means forecasted considerable deterioration of the relative demographic situation) (Wiktorowicz, 2013, p. 24).

## **Economy and labour market**

### **Pension system in Poland**

In Poland there're two separate pension systems – agricultural one (focused for self-employed in agriculture and strongly subsidised by the government) and non-agricultural one. Information below is done for the second system. Poland's current pension system is based on a multi-pillar arrangement that comprises a state-run social insurance system and a system of mandatory and voluntary individual retirement accounts. Starting from 1999

the Polish pension system consists of three pillars: the first two are obligatory ones and they are complemented by voluntary pension savings.

The first pillar is a mandatory pay-as-you-go scheme based on notional defined contribution (NDC) accounts, run by the state-owned Social Insurance Institution (ZUS) with a guaranteed minimum pension, which is being paid to persons who reached the statutory pensionable age and have accumulated at least 20/25 contributory years for women/men. The guarantee is means-tested and is hence triggered if the total pension falls below a certain threshold. The difference is topped up from the state budget.

The mandatory second pillar with individual accounts take the form of open pension funds. In its initial version it was fully funded and invested on the market. Open pension funds could invest at most 40% in equities from the regulated stock exchange market; 10% in equities in the regulated non-exchange market; 40% each in mortgage bonds, municipal bonds, corporate bonds; 10% in certificates of close-end investment funds; 15% in units of open-ended investment funds; 20% in bank deposits and bank securities. In the last years bigger and bigger part of social contribution is invested by ZUS in the government's bonds.

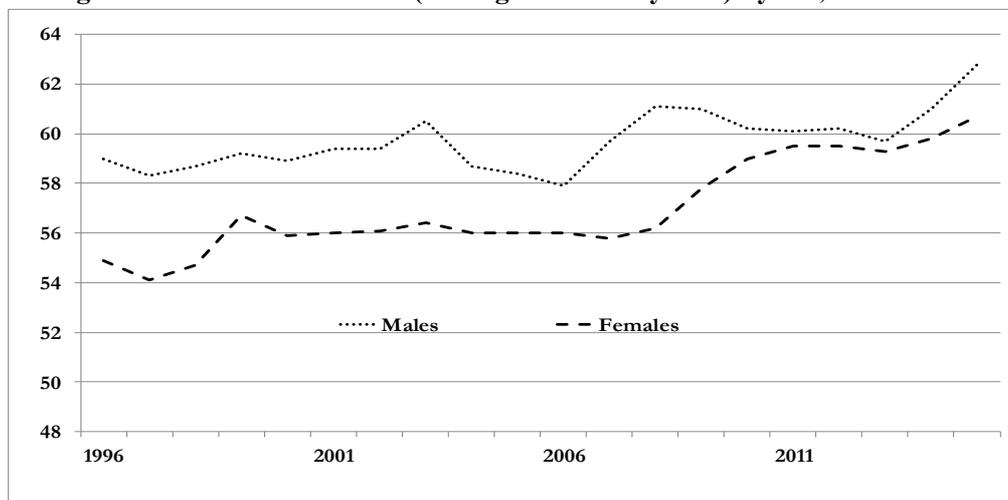
The third pillar i.e. voluntary occupational pension plans (PPE) are defined contribution plans with limited tax incentives.

Benefits depend strictly on contributions taking into account average life expectancy at the time of retirement. Starting from 2006, ZUS has been obliged to provide all insured persons (born after 31 December 1948) with annual information about contributions recorded on their individual accounts, amount of initial capital after indexation and about the hypothetical old-age pension amount. The minimum pension age was until 2012 65 for men and 60 for women. From 1 January 2013 the retirement age was started to increase by a month in January, May and September each year until it reaches 67 for both sexes. From October of 2017 the pension age will be lowered to 60 (males) and 65 (females).

For the minimum pension, 25 and 20 years' contributions are required from men and women, respectively.

In the last years the mean age rate retirement increased due to changes in law and to better situation in the labour market (figure 1).

**Figure 1. Mean age at retirement in Poland (non-agricultural system) by sex, 1996-2015**



## **Replacement rate**

In the last years the replacement rate is lowering due to two factors. First of all the new pension system is producing first pensioners with much lower pensions. The second reason is pension indexation which is lower than pace of wage increase. The replacement rate which was equal to 60% in 2000s, now is near to 55%

## **Incentives for early/late retirement**

There are no provisions for early retirement in the current non-agricultural pension system. The old pension system (applicable to persons born before 1949) allowed various forms of early retirement for specific groups, such as miners, railway workers, teachers, people working in special conditions and women.

It is possible to defer both the notional and the funded, defined-contribution pension component without any age limits. People who defer claiming pension after normal pension age contribute and earn extra pension.

It is possible to combine work and pension receipt. However, an employment contract has to be ended before the withdrawal of a full pension is possible. The pensioner can thereafter continue to work on a basis of a new contract and receive the full pension.

## **Support for unemployed**

There is a scheme of pre-retirement allowances, available to unemployed people who were laid off (for example, due to liquidation, bankruptcy or restructuring). Pre-retirement allowances are paid from the state budget to women from 55 and men from 60 until reaching pension age. During periods of unemployment benefit receipt, the government pays the contributions to the pension system based on the size of the unemployment benefit. All the periods for which contributions are paid qualify for the minimum pension guarantee

## **Age discrimination regulations and chosen public policies**

The term 60 plus was defined in 2015 in Poland as referring to people aged 60 and more. It has not influenced the labour market much though. In this case it was more significant that people aged 50 and more facing the problem of unemployment can be given a privilege of „a person in a special situation on the labour market” similarly to people aged 25 and less, long-term unemployed, unemployed due to lack of professional qualifications, disabled or lonely parents of children up to 7 years old.

Generally lack of discrimination (understood as special treatment) on the grounds of age on the labour market - previously manifested by the lack of age issue being a factor possibly used by the employer during recruitment, promotion or dismissal - was reinforced in 2004 when, with the admission of The EU Labour Code has been

extended to include an "anti-discrimination" chapter on counteracting potential age discrimination as well as sex, disability, race, ethnicity, nationality, sexual orientation, political beliefs and religious beliefs.

It is worth to mention that Polish government has not taken any efforts to introduce a possible three-year period to adjust national legislation to the European one, apparently having assumed that this process- de iure and de facto- took place naturally. The anti-discrimination practice was very strongly linked to the situation on the labour market, being very evident especially in the approach of the Polish labour courts to the attainment of retirement age as a sufficient condition for termination of employment. Until the first decade of the 21<sup>st</sup> century this was considered enough reason for termination of employment. This practice was soon finished. Due to discontent of employers the rule was adopted that with the date of pension rights acquisition, the contract becomes automatically terminated while a possible continuation of work being the result of a new employment contract and thus depending not only on the employee's willingness, but also on the employer's interest.

Polish government has been developing its seniority policy since 2011 which was a year of preparation for the European Year of Active Aging and Solidarity Between Generations. The policy is mainly focused on inactive people of 60 + and above all, on their social, educational and cultural activities.

The 50 + employees are supported by the government's program: "Solidarity between generations - actions for increasing the working activities of people 50+" which has been introduced in 2008. The program envisages measures that would increase incentives for the employment of people aged 50+ by entrepreneurs and, on the other hand, measures that promote the improvement of the qualifications, skills and work efficiency of persons employed. The program was given revision in 2013 (Resolution nr 239 of Council of Ministers from the 24<sup>th</sup> of December 2013)<sup>1</sup>, and at present its goal is to reach the employment rate of people aged 55-64 at 50% in 2020.

Urbaniak mentioned that if the policy is detached from the overall HRM system, then even manifestations of the firm's favourable attitude to the employment of older employees will be just a superficial practice resulting from opportunism, representing tokenism rather than real interest determined by business calculations. Tokenism is regarded as a symptom of a discriminatory practice, where the members of a given minority (in this case the older workers) play a limited role, making other people believe (intentionally or not) that real actions aimed to include a given minority group are being taken. In fact, an employer keeping few older workers does not change his or her generally reluctant attitude to employing this category of employees. A serious issue in the discussion of the profitability (higher or lower) of employing older employees is the younger generation's attitude to older workers and what the younger persons think about their own professional careers at later stages of life (Urbaniak, 2011).

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<sup>1</sup> <https://www.mpips.gov.pl/seniorzyaktywne-starzenie/program-solidarnosc-pokolen/>

## Sectoral composition (inc future skills demands)

In the national economy in Poland 8.4 mln persons are paid employed (tab. 1). 2/3 of persons are employed in enterprise sector, especially in industry (30.4%), trade, repair of motor vehicles (14.0%) and education (12.3%). Within industry most important role plays manufacturing (25.9), of which - manufacture of food products (4% of total employed), manufacture of fabricated metal products, except machinery and equipment (3%), manufacture of motor vehicles, trailers and semi-trailers (2.1%) and manufacture of rubber and plastic products (2.1%).

**Table 1. Average paid employment<sup>1</sup> by sections of national economy in Poland in 2016**

	<i>thous.</i>	<i>%</i>
<b>T O T A L</b>	8483,5	100,0
<b>of which:</b>		
<b>ENTERPRISE SECTOR</b>	5760,2	67,9
<b>Agriculture, hunting and forestry</b>	74,0	0,9
<b>Industry</b>	2581,5	30,4
<b>mining and quarrying</b>	135,3	1,6
<b>manufacturing</b>	2194,1	25,9
<b>electricity, gas, steam and air conditioning supply</b>	117,9	1,4
<b>water supply; sewerage, waste management and remediation activities</b>	134,2	1,6
<b>Construction</b>	385,2	4,5
<b>Trade; repair of motor vehicles</b>	1189,8	14,0
<b>Transportation and storage</b>	513,8	6,1
<b>Accommodation and catering</b>	112,6	1,3
<b>Information and communication</b>	204,5	2,4
<b>Financial and insurance activities</b>	245,3	2,9
<b>Real estate activities</b>	109,5	1,3
<b>Professional, scientific and technical activities</b>	255,0	3,0
<b>Administrative and support service activities</b>	383,3	4,5
<b>Public administration and defence; compulsory social security</b>	618,0	7,3
<b>Education</b>	1043,7	12,3
<b>Human health and social work activities</b>	635,5	7,5

<sup>1</sup> Excluding economic entities employing up to 9 persons

Source: GUS (2017), *Employment, wages and salaries in national economy in 2016*, Warsaw.

What kind of employees do the Polish employers look for? In the light of the Study of Human Capital (Religa, 2015, p. 21), the three most sought-after occupational categories included: craft workers and operators (44% of employers looking to hire new people were advertising for these occupations), professionals (22%, and if associate professionals and technicians are included – 37%) and salespersons and service employees (21%). Demand for professionals rose significantly (mostly for general practitioners, nurses, physiotherapists, teachers of vocational subjects and of languages, specialists in economy and programmers), as well as for craft workers (the most for glaziers, machinist, mechanics, carpenters, and seamstresses).

Employers are looking for people to fill specific vacancies, mostly with prior experience and with a specific set of qualifications and competences. Among the general requirements formulated towards the candidates in job offers, the most important remains prior work experience and education. The role of experience has generally increased in the declarations of employers. The more specialized the occupation, the higher was the level of education required of candidates. Persons with primary education had very poor chances for finding

employment, and it took at least a vocational education to significantly increase chances for work. Despite the fact that the two-level system of higher education has been functioning in Poland for some years now, the employers still favour full education to a master's degree. The third most important criterion for the candidates was their gender. From the global perspective, this criterion became less important among employers seeking new employees. A visible polarization of gender requirements remained for the white-collar and blue-collar occupations. For the latter, males were definitely preferred, while in the case of white-collar jobs, the candidate's gender was irrelevant (tab. 2).

**Table 2. General requirements of employers seeking employees towards candidates for the various occupations (in %)**

Occupations	Education	Occupation	Experience	Gender	Language
managers (MANA)	87	2	89	47	50
professionals (PROF)	87	3	62	33	59
technicians and other associate professionals (TECH)	70	18	63	49	44
clerical support workers (CLER)	64	20	42	59	61
service and sales workers (SERV)	51	26	54	68	40
craft and related trades workers (CRAF)	48	32	76	88	13
plant and machine operators, and assemblers (OPER)	30	20	75	85	32
elementary workers (ELEM)	17	8	48	90	13
total	57	19	64	66	36

Source: BKL Employer Study 2013, 2014 in: Religa J., 2015, p. 22.

**Table 3. Competencies of Poles - requirements of employers seeking employees towards candidates for the various occupations (in %) vs. self-assessment of employees (in points)**

Competencies	% OF EMPLOYERS									SELF-ASSESSMENT OF EMPLOYEES				
	MANA	PROF	TECH	CLER	SERV	CRAF	OPER	ELEM	Total	Total	Sex		Age	
											M	F	45-54	55+
Self-organisation	47	52	53	57	59	53	44	4	54	3.3	3.2	3.4	3.1	3.0
Occupational	39	39	33	19	32	51	38	30	38	x	x	x	x	x
Interpersonal	35	46	50	53	55	13	29	21	36	3.8	3.8	3.9	3.7	3.6
Cognitive	26	12	14	16	13	11	9	9	12	3.5	3.4	3.5	3.3	3.1
Technical	7	6	5	6	8	20	13	8	11	2.9	3.4	2.3	2.9	2.9
Computer	6	21	16	19	10	3	0	1	10	3.1	3.1	3.2	2.6	2.2
Availability	10	10	9	3	7	5	15	13	9	3.6	3.7	3.5	3.6	3.3
Qualifications	2	11	9	5	3	6	25	4	9	x	x	x	x	x
Physical fitness	0	1	6	0	4	7	19	19	7	3.5	3.6	3.4	3.2	2.8
Language-Polish	9	10	10	12	2	0	9	2	6	3.6	3.5	3.7	3.4	3.2
Managerial	36	6	5	6	3	2	3	1	5	3.0	3.0	3.1	2.9	2.8
Clerical	8	7	12	13	2	1	4	0	5	2.9	2.7	3.1	2.8	2.6

Other	1	2	2	6	4	3	8	3	3	x	x	x	x	x
Artistic	1	3	4	5	2	1	0	0	2	2.6	2.4	2.8	2.4	2.2
Mathematical	0	1	0	6	3	1	0	0	1	3.2	3.2	3.3	3.1	3.0

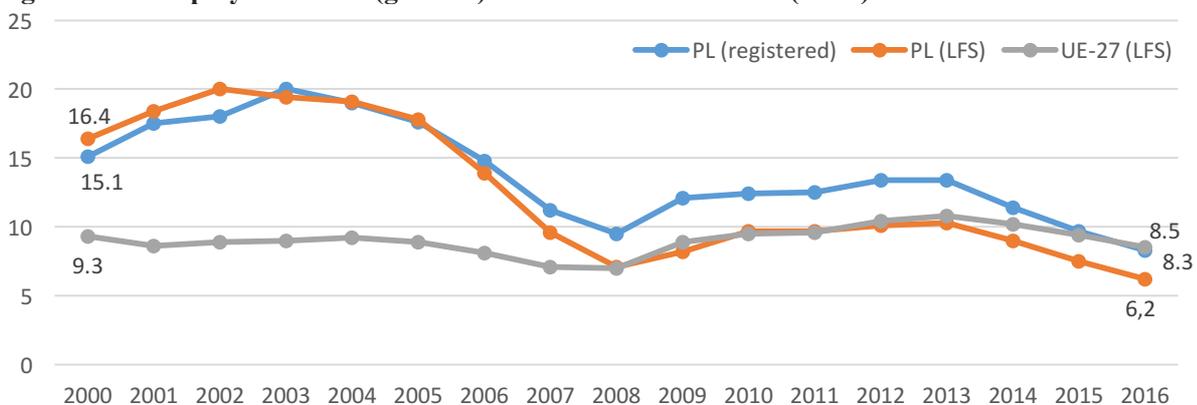
Source: BKL Employer Study 2013, 2014 in: Religa J. (2015), p. 11, 23

Competences considered most useful by employers (irrespective of occupation for which they were recruiting) include the following: self-organisation – 44% of employers looking for workers (self-starting, independence, time management, decision-making, initiative and resilience to stress), interpersonal – 40% (contacts with others, communication, cooperation within a group and problem-solving abilities) and occupation-specific – 26% (the skills required to perform tasks specific for the individual jobs – tab. 3. The scale of problems tied to finding the right candidates for work has been rising systematically – in 2014 the proportion of employers who encountered problems was 80%. The largest number of employers (90%) with such problems came from the construction and transport sector, as well as in the health services and welfare sector. When listing specific shortcomings, the employers spoke of competence shortages, insufficient work experience, and insufficient motivation to work. The competence shortages unfortunately most frequently applied to those competences that were seen as the most desirable by the employers - the insufficient occupational competences, independence, industriousness, and resistance to stress of the candidates, as well as shortages in interpersonal competences.

## Unemployment

Unemployment rate in Poland was increased from 2002-2003 and now is lower than in EU-27 (fig. 2). Using registered data we could note that the unemployment rate increases from 15.1% to 8.5%, using LFS data (more restricted definition) – from 16.4% to 6.2%.

**Figure 2. Unemployment rate (general) in Poland in 2000-2016 (in %)**

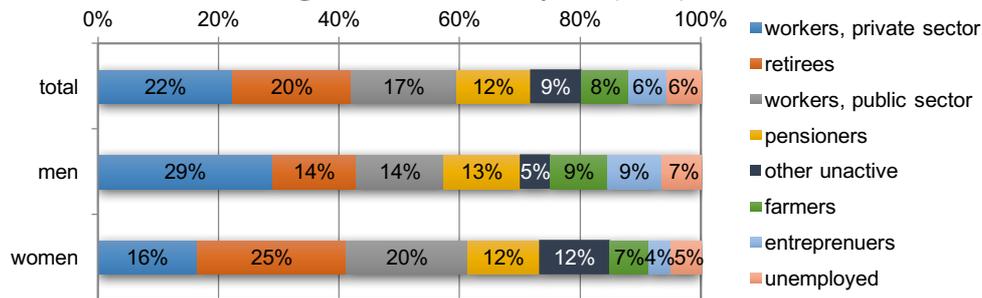


Source: GUS, <http://stat.gov.pl/obszary-tematyczne/rynek-pracy/bezrobocie-rejestrowane/stopa-bezrobocia-w-latach-1990-2017,4,1.html> and Eurostat (LFS) data [lfsa\_organ].

## Unemployment 50+

Analysing economic activity of people aged 50-64 we could note, that one person in five (for women, one in four) is retired (Fig. 3). 40% are generally economically inactive, with the percentage among women reaching almost 50% (32% for men). Among working people, a large percentage (17%; 29% of the total population of economically active people at this age) work in the public sector (23% for all employees). This pertains primarily to women (20% of them work in the public sector, which amounts to 42% of the economically active ones).

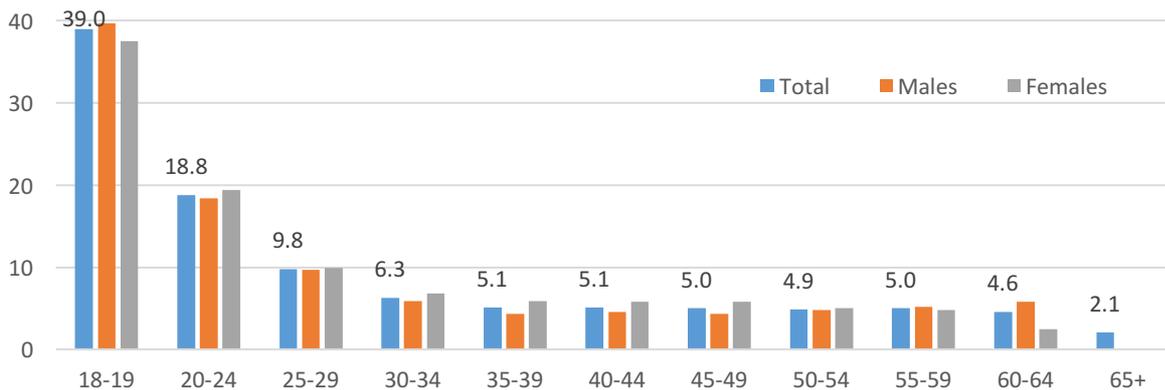
**Figure 3. Economic status of Poles aged 50-64 in 2015 by sex (in %)**



Source: Own calculations on the basis of individual data of Social Diagnosis 2015.

Unemployment rate of people aged 50+ is lower than young people – approx. 5% vs. approx. 40% for people aged 18-19 and approx. 19% for aged 20-24 (Fig. 4). This situation is similar for males and females. Only in the group 60-64 (as result lower age retirement age) the unemployment rate is much lower for women (2.5%) than men (5.8%).

**Figure 4. Unemployment rate in Poland in 2016 by age groups and sex (in %)**

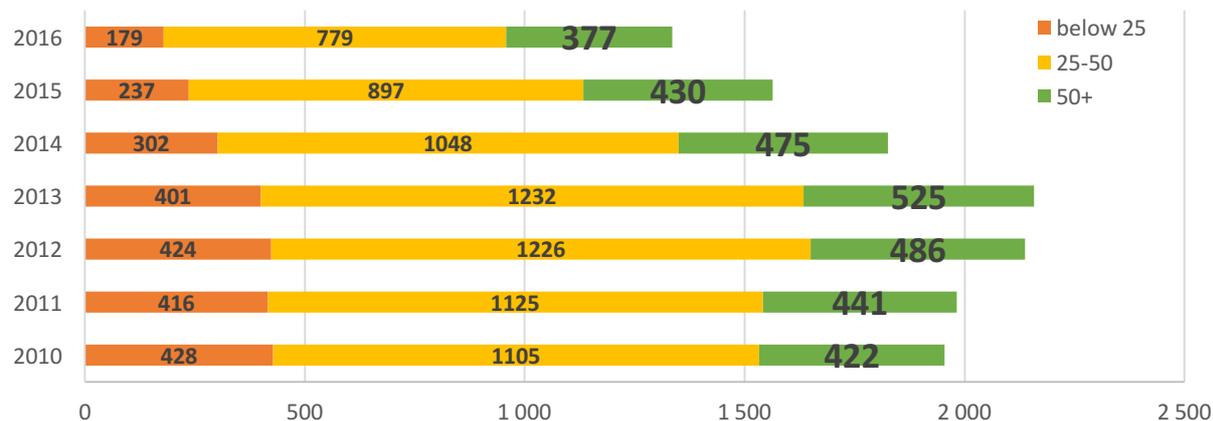


Source: *Labour force survey in Poland in the years 2013-2015*, GUS, Warsaw 2016.

People aged over 50 are one of the groups with a specific situation on the labour market. The size of this group is large and stable instead of increasing of unemployed population. About 400-500 thousands persons aged 50+ (377 thous. in December 2016) is unemployed. Additionally, while the population of young

unemployed increased from 428 thous. in XII.2010 to 179 thous. in XII.2016, the number of unemployed aged 50+ is on the similar level as in XII.2010, but visibly lower than in XII.2013 (Fig. 5).

**Figure 5. Registered unemployed persons by age groups in 2010-2016 (31.XII, in thousands)**



Source: own calculations based on GUS data (*Registered unemployment I quarter 2017*, Warsaw, June 2017).

The problem is also long-term unemployment of people aged 50+. Half of unemployed aged 50+ (both men and women) are long-term unemployed (over 12 months, in which 33% - over 24 months). In total population of unemployed these indicators are lower (39% and 24%). The reason of the problem with return to work is the low level of education of this population – approx. 70% (66% using LFS data, 70.4 – using registered data) of unemployed aged 50+ have only vocational or lower education (*People over 50...*, 2017). Unemployed 50+ have also low and outdated qualifications, in combination with low educational activity (in total, because in people aged 50+ with higher education this activity is similarly with younger groups).

An average duration of unemployment is more than 37 months and is longer for people aged 50+ than those 45-49, and is clearly associated with the level of education (for those with no higher than lower secondary education it reaches even on average 59 months). The chances of that group to find a job in a situation of unemployment are evaluated as low. Self-employment opportunities decrease with age, especially for women. Staying jobless even above three months and, even more, having a formal status of an unemployed person often disqualify a candidate (regardless of age) in the eyes of employers, making them closely checked by employment agencies, especially during a recruitment process to higher and top management positions. Not so much age as the status of the unemployed is the cause of major difficulties in returning to work. On the other hand, it was emphasized that employers having the choice between two candidates with comparable qualifications and skills, but differing in age, will opt for the younger person, even when the requirements connected with offered work do not concern the age. Young people are especially preferred by employers running their own business. In this case, it is difficult to talk about equality of opportunity due to the age of the candidates seeking employment.

On the other hand, the situation of the people aged 45/50+ on the labour market is - in the opinion of some representatives of the labour market institutions (2012) - much more better than the position of young people (Kryńska et al. (eds), 2013, p. 12).

### **'At risk' unemployment (youth, migrant workers, etc)**

The Act of April 20th, 2004 on Promotion of Employment and Labour Market Institutions (article 49) defines people aged 50+ as one of the group (persons) whose situation on the labour market is special. Other "in risk" groups defined in this Act are: the unemployed under 30 years of age, the long-term unemployed, the unemployed benefiting from social assistance, the unemployed who maintain single-handedly at least one child aged 6 or lower or at least one disabled child aged 18 or lower, the unemployed who are disabled, and for the carers of a disabled person looking for a job who are not in employment or who is not performing any other paid work.

The number of foreigners registered as unemployed amounted to about 3,500 at the end of 2016. Foreigners accounted for about 0.26% of the total number of registered unemployed. In 2015 it was 0.24% and in 2014 it was 0.21%. The share of foreigners in general registered for years does not exceed 0.3%, although it is on an upward trend (at the end of 2007 it was 0.10%, at the end of 2011 0.18%). The largest group among the registered unemployed foreigners are citizens of Ukraine (37%), Russia (15%) and Belarus (8%) (*Informacja...*, 2017 [r.\[http://www.mpips.gov.pl/gfx/mpips/userfiles/\\\_public/1\\\_NOWA\\\_STRONA/Analizy\\\_i\\\_raporty/cudzoziemny\\\_pracujacy\\\_w\\\_polsce/Inf.\\\_zatrudnianie\\\_cudzoziemcow\\\_03.17.pdf\]\(http://www.mpips.gov.pl/gfx/mpips/userfiles/\_public/1\_NOWA\_STRONA/Analizy\_i\_raporty/cudzoziemny\_pracujacy\_w\_polsce/Inf.\_zatrudnianie\_cudzoziemcow\_03.17.pdf\)](http://www.mpips.gov.pl/gfx/mpips/userfiles/_public/1_NOWA_STRONA/Analizy_i_raporty/cudzoziemny_pracujacy_w_polsce/Inf._zatrudnianie_cudzoziemcow_03.17.pdf)).

European scholars identified 5 main social policy regimes in our continent: the liberal (Anglo-Saxon) welfare system, the social democratic (Scandinavian) welfare system, the corporatist (Continental) welfare system, the familistic (South European) welfare system and the welfare system of countries in transition (Central and Eastern European countries). Poland is included into the last model which distinctive characteristics are based on social policy reformed in case of financial restrictions and ambivalent results. Typical reforms are related to privatisation of social services (mainly pension systems) and coordination of the public and market approach in domain of social services. Research done in 2010s revealed that the specific for new EU member states social policy regime didn't converge with other regimes observed in the EU and with the European Social Model (Draxler, Van Vliet, 2010).

Despite the first steps to identify relations between social policy regimes and active ageing/silver economies classification there is no conclusive results which should be useful here. A. Klimczuk (2016) tried to combine approaches to active ageing, silver economy and to social policy regimes but his proposal to describe situation in the CEE countries as "dependent market economies" is based on many assumptions and oversimplifications. He suggested to use the term coined by Andreas Nölke and Arjan Vliegthart which was used to describe "countries in transition" economies from perspective of "varieties of capitalism" and is characterized by the

importance of foreign capital for the socioeconomic setup. But in his proposal there is no distinctive characteristics which could be specific neither for active ageing policy implementation nor for silver economy development. Probably when the active ageing policy is analyzed specific approach should be elaborated which should be focused on few rudiments: a) cohesion and broadness of public activities aimed at raising age at retirement; b) access to public health care oriented towards age60+-specific problems; c) silver economy development – how important are goods and services elderly oriented; d) access to public “activization” services; e) access to non-governmental organization aimed at activization of the elderly. Unfortunately there is no comparative research in the field in the EU.

## **Age management**

### **Age management in Poland**

These issues are the starting point for the age management – human resource management activities which are tailored to the needs of people at a different age, particularly those at later career stages.

Age management is a new issue that appeared in foreign literature less than twenty years ago, whereas, in Polish literature only a few years ago. A review of literature allowed to formulate the thesis that this issue most often falls within human resource management, pursuant to: R. Jaros, P. Krajewski, M. Mackiewicz (Jaros, Krajewski, Mackiewicz, 2010, p. 50), B. Urbaniak and I. Wieczorek (Urbaniak, Wieczorek, 2007, p. 11), J. Liwiński and U. Sztanderska (Liwiński, Sztanderska, 2010), and T. Schimanek 2010, p. 48). The term "age management" may refer to various dimensions of HRM within an organisation with a clear focus on aging (Walker, 1997) but it can also refer to the policy or collective bargaining (Walker, 2005, p. 685). This term is sometimes associated with strategic management or diversity management: "(...) it is" an element of human resource management, and more specifically: an element of diversity management. It consists in implementing of a variety of actions that allow for a more rational and efficient use of human resources in enterprises by addressing the needs and abilities of workers of all ages " (Liwiński, Sztanderska, 2010). Some approaches suggest using the term "age diversity management" in this context as a more appropriate one (Kulicka, 2012, p.13).

A review of Polish research on age management has shown that:

- Knowledge about age management is low among employers - especially smaller ones (Krynska at all, 2013);
- Lack of employers' interest in training projects concerning human resources management. Most small and medium-sized companies do not use any human resource management tools and are not interested in using their employees' potential. Only 12% of companies use any mechanisms to adjust the potential of their employees to their needs (Abramowicz at all, 2011);
- Age management does not exist in Polish companies as a planned and purposeful activity, there are only symptoms of the growing need for age management (Urbaniak, 2011);

- From the perspective of HR specialists, the situation of people aged 50+ in the labor market is very difficult and results, among others, the characteristics of this group, as well as the stereotypical perception of people of this age and cultural conditions, which altogether discourages employers to employ older people (Woszczyk (ed), 2011);
- The willingness of employers to support the activation of people 50+ largely depends on the attitude of employers towards employing people from this age group and the satisfaction of employers with cooperation with people aged 50+ (Schmidt (ed.), 2012);
- Enterprises do not fully exploit the potential of older employees (Fornalczyk, Stompór-Świdarska, Ślęzyk-Sobol, 2015; Jędrych, 2015).
- As results from the few national-level studies on this issue (Perek-Bialas 2010), only 7% of companies (including 10% of the public sector and 5% of the private sector) assessed the rules of age management as very clearly defined (the other 17% indicated the answer "rather yes"). What is important, as many as 20% of enterprises do not implement age management at all. Moreover, the repertoire of age management tools used by Polish companies is limited. Every third company implements ergonomic solutions for senior workers, one in three directs 50+ employees to trainings. It is also worth noting that 29% of companies use flexible working hours, and 26% - supports mobility within the enterprise. The solution with the greatest potential seems to be supporting mobility of workers aged 50+ within the organization - half of the companies indicated that it may be applied in the future (Wiktorowicz, Gajda, 2013).

Upon reading the subject literature and numerous study results, we are inclined to state that Polish entrepreneurs do not, as yet, employ age management on a common basis. Both in the context of perceiving mature employees and age management tools used in practice as well as overall “climate”, they are advanced at an intermediate level and quite diversified. The study presented that adoption of the age management strategy of 1<sup>st</sup>, 2<sup>nd</sup> and 3<sup>rd</sup> generation happens more by organisations based on knowledge and the strategies of ‘solving the problem of scarce resources’ and ‘reducing labour requirements’ (“hard” age management) are implemented more willingly by traditional companies. Such model approach to age management in the form of hard and soft strategies may rise a question of divisibility of both approaches, however, despite certain simplifications, an ordering character of them cannot be denied (Warwas, 2016).

Results of research on relations between human resources management standards and employee participation seem to be interesting. Companies with trade unions were less likely to reach for high standards of human resources management than companies without trade unions interested in strategic human resource management standards. People employed in trade unions companies do not feel participatory aspirations as much as these employed in a non-union companies. This may mean that lack of formal organizations representing the employers does not influence suppression of participatory needs when high standards of human resources management is implemented (Urbaniak, Rogozińska-Pawelczyk (ed.), 2010, p.246).

## Case study: Volkswagen Poznań Ltd

VW Poznań is a big production facility, part of a global concern. The company has been implementing complex and coherent actions which have been adapted to Polish conditions. Implemented solutions are based not only on home organization know-how, but also on research and expertise. A significant aspect is also cooperation with trade unions and application of direct participation- considering the opinions, suggestions and ideas of the crew. Attention paid to health of older employees allows for reduction of one of the main reasons for earlier retirement which is bad health condition.

Volkswagen Poznań seems to be a company fully aware of demographic challenges which are gradually taking place in Polish society. In order to maintain healthy and balanced crew the company implemented an innovative project- Demographic Challenges. The main focus is put on creating ergonomic workplaces and on providing tools for personal development which in the effect allows for keeping the most precious capital- knowledge and experience- in the enterprise.

Constant care for body and mind fitness is continuously promoted according to the rule: tomorrow is today.

The project is completed by the health strategy being a set of guidelines realized within the program of medical and personal care targeted at improvement and support of employees health. According to the project both enterprise and people employed are equally engaged in constant efforts and work on good health which also includes preventive health benefits actions in the workplace. The purpose of these activities is a broad promotion of healthy lifestyles as well as prevention and early detection of diseases. The company has its own highly equipped sports centre. All employees are offered health prevention package which in case of 50 + employees additionally includes: (1) annual medical examination, (2) outpatient care that allows diagnosis in the direction of age-related diseases (diabetics, hypertension, coronary diseases), (3) prevention of musculoskeletal system diseases through group exercises and rehabilitation, (4) other preventive actions to mention mammography, lectures prostate disease prevention, (5) rotation of positions in case of health problems.

In addition to pro health actions the company introduced ergonomic advice. They are individual sets of advice for each workplace thanks to which the employee is well equipped in the knowledge of correct way of performing tasks. These actions are used to stimulate ergonomic awareness. There were also efforts taken to verify harmful factors which could strain employees. This way Volkswagen Poznań created a map thanks to which it is now clear where employees with health restrictions can be placed. Internal survey proved that by 2020 the company will have faced serious problems with management and effectiveness of people employed. The problem is even more serious as it is a production company. It has become clear that organization must shape its policy accordingly to various areas of management. The average age of a person employed is 36,5 years. In ten years' time an average employee will be nearly 50 years old. The areas in which the company intends to work to avoid this problem are the appropriate management of staffing and the creation of a mixed structure where young and old workers will be involved. Another step will be new technology and thus creating new work places.

The company signed a letter of intent on the 17<sup>th</sup> of May 2010 in which principles included in the Work Relations Card were accepted. This way the company expressed their willingness to jointly discuss and take measures leading to the further development of social dialogue. The Card includes: (1) social responsibility, (2) co-decision, (3) balance between the competitiveness of the company and the welfare of employees, (4) social dialogue.

Volkswagen Poznań is a proud holder of a title: “Employer Friendly Employees 50+”. Among other awards and distinctions are main prize in the third edition of the competition: Profit from maturity. The title "Employer Friendly Employees 50+ in 2011", which was awarded for a comprehensive approach to human resources management including employees 50+. The jury stressed the implementation of the Demographic Challenge project as one of the best practices in Polish companies.

Source: Elaborate base on: OECD (2015), *Starzenie się i Polityka Zatrudnienia: Polska 2015*, OECD Publishing, Paris, s. 96; <http://www.vw.pl>; <http://www.solidarnoscwvp.pl>; Klimek-Michno K. (2015), *Wyzwania demograficzne w firmie Volkswagen, Personel i Zarządzanie*, nr 5, s. 32-34; <http://www.kadry.abc.com.pl/artykuly/innowacyjna-technika-innowacyjny-pracodawca-studium-przypadku-volkswagen-poznan,57939.html>

## **Age management in Polish SMEs**

Important entities employing mature employees are small and medium enterprises in Poland SMEs have developed human resource management processes (HRM) or a formal HRM strategy which in effect has an adverse impact on improving the competence of their employees (BKL, 2015). Furthermore, their organisational culture is not conducive to the implementation of proactive age management strategies – the domination of hierarchy (71%) characteristic of autocratic companies together with employees’ instrumental attitude towards work (source of income) (Tarnawa, Zadura-Lichota, 2014). The stereotypical perception of 50+ employees also constitutes quite a problematic issue (Schmidt, 2012). Though it now remains underdeveloped and often marginalised, especially in SMEs, the implementation of age management will gain importance in business in Poland. Owing to the significance of these actors in the economy, SMEs should be most notably supported in this area<sup>2</sup>.

### **Research conducted in 2017 shows (Wiktorowicz, Warwas, 2017), that:**

(1) Nearly half of the surveyed companies have established a development strategy (in the form of an official document – 17%, unscripted guidelines – 30%). More than a half of SMEs have no defined development strategy (54%). Even smaller percentage of companies have a personnel strategy (in the form of an official document – 10%, unwritten – 17%). (2) Age management benefits are especially seen in terms of profiting from skills of mature employees (almost two thirds of indications) as well as maintenance of organisational capital

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<sup>2</sup> They generate nearly three quarters of GDP, their gross value added is continuously growing since 2005. Moreover, they amounted to almost 4.2 million in 2015 (99.89% of all enterprises) employing two in three employees (CSO 2016a, 2016b).

at a high level (about 60%). (3) Analysing governance/participation, an absence of trade unions or other forms of employee representation can be noticed in the majority of small and medium-sized businesses. In the area of external cooperation, SMEs collaborate mainly with trading companies (40%), less often with business supporting institutions (29%) and third sector (14%).

As a starting point for age management implementation, the age structure of workers is monitored by less than one third of SMEs, with only 14% of them – on a regular basis. Considering recruitment, advertisements devoid of discriminating content as far as candidate's age is concerned are oftener submitted by medium-sized employers (49%) rather than by companies providing work for from 10 to 49 workers (31%). Similarly, there are significant differences in terms of: recruitment interviews, age management training of staff involved in employee acquisition (14% versus 9%).

In the leaving organisation process, the vast majority of SMEs fail to offer their 50+ workers any tools intended to support this procedure. In turn, in the sphere of employees' development related activities such as motivation or periodic evaluation, the situation seems decent. Half of respondents from smaller companies point to the absence of employee appraisal system. Furthermore, enquired about different motivational tools (trainings, employees' attitudes and expectations, bonuses and other remuneration components), 87% of respondents made an affirmative reply (confirming at least one of the analysed solutions).

One of the most important instruments of Age Management is intergenerational transfer. Only 6.7% of SMEs entities uses none of the fourteen (the most important according to literature review) selected instruments of intergenerational knowledge transfer in Polish small and medium-sized enterprises, and 14% employs all of them. These are incidental rather than permanently inscribed into the operation of the company – less than 3% uses all of the examined instruments as a standard practice, and about 23% - applies none of them in such a broad extent. Among the tools of intergenerational knowledge transfer, employers most often pointed to: overlapping responsibilities and work in age-varying teams – as in about 80% of SMEs and a standard practice within over half of enterprises (Wiktorowicz, Warwas, 2017).

Regarding work organization issues, most Polish employers did not notice flagging interest of 50+ generation in the indicated work system (e.g. teleworking, two-shift work, overtime work, etc.). Nevertheless, enquired about two-shift system, 28% of respondents representing small companies claim that they have not observed the declining interest in the above mentioned among employees over the age of 50. In turn, 23% of respondents from larger companies noted the lack of interest in the outside work.

The 4-year-long term of protection for pre-retirement age fulfils its role – most employees stay in employment. Notwithstanding, in 6% of SMEs its impact is counterproductive since it limits the employment of 50+ people. Specific solutions that could contribute to prolonging the workforce of employees include: shift to less physical (41.4%) and mental (35.9%) work, flexible work arrangements – reducing work hours (40.4%) as well as flexible working time (29.4%). Moreover, flexible (mobile) working hours and its more convenient organisation were primarily suggested among the flexible forms of work organisation. Nonetheless, every third employer is of the opinion that such activities will not be effective since if an employee can retire, nothing will motivate him/her to stay in employment (Wiktorowicz, Warwas, 2017).

It is important to analyze the motives of implementing Age Management strategy. Only every tenth company reports inclusion of the silver economy to its policy as a standard practice. Four out of ten small and medium-sized businesses are at least marginally concerned about the demographic change in their marketing activities, every third company has service standards and/or manufactures products or services allowing for the needs and capacities of 50+ clients. Regarding to strategy - one fourth of small and medium-sized companies employing workers over the age of 50 often use proactive age management. The strengthening personal resources strategy can be found in 7% of SMEs, intergenerational learning strategy – every fourth enterprise, and life-long approach – 40%.

## **Trade unions in Poland and their role in active aging**

### **The position of trade unions in Poland**

Recent studies of official statistics on the condition of unionization in Poland (and the first in 25 years), conducted on the obligatory reporting basis of this type of organization, indicate that in 2014 12.9 thousand trade unions' organizational units remained active. Compared with the data of the National Official Business Register, REGON, it can be concluded that many of them no longer work yet remained registered for almost 19.5 thousand trade unions with legal personality may be found in REGON (15.2 thousand in 2001 and around 19 thousand since 2006). Trade unions comprise the second largest non-profit sector collective.

Among the versatile forms of their possible activity, trade union organizations are the most important in Poland (78%), followed by inter-company union organizations (18%). In addition, federations, confederations and their field or industry structures as well as so-called uniform trade unions operated across the country – in total, active entities of these types amounted to around 0.3 thousand (i.e. 2%). The least numerous groups encompassed sub-department trade union organizations (1%) and full-time farmers' trade unions (only 0.1%). Furthermore, 92% of trade union units were located in cities, above all in voivodships with the substantial share in mining – Silesia (15% of the total number), Lower Silesia (9%) as well as Masovian (12%). As for 2017, over half of the respondents (57%) find no such organizations at their workplace (CBOS, 2017).

In 2014, only 2 thousand active trade union organizations functioned independently whereas 10,900 (82%) created extensive organizational structures. The most popular (84%) are those with a three-level hierarchy: factory and inter-company organizations associated directly in industry or territorial structures, and then in one of the nationwide trade unions' organizations. The second in terms of prevalence was a two-level hierarchy (9%) – workplace or inter-company organizations that belong directly to nationwide unions, confederations or federations. 6% of trade unions adopted even a four-level hierarchy – a company and inter-company organizations are associated in territorial structures, which then belonged to industry structures further unionized in headquarters and confederations. The group of entities representing the interests of trade union organizations at the central level was relatively narrow and amounted to about 40 units. Most often, organizations associated in trade union structures belonged to three trade union centers: Trade Unions Forum,

NSZZ "Solidarność" and the All-Poland Alliance of Trade Unions. The majority (66%) of company trade union organizations operate in public entities (CSO, 2015), above all in larger organizations, although the structure of business entities is completely different. Company trade union organizations usually operated in enterprises employing between 50 and 249 people (55% of unionized enterprises), then in large enterprises (31%), and the least often in entities employing less than 50 people (14%). As far as industry is concerned, among entities employing over 9 employees, the largest unionization takes place in mining industry (as many as 72% of employees belong to trade unions), education, transport and storage and healthcare. The largest number of members could be found in mass organizations (over 1 thousand members) – 36%, although they constituted only 1% of all trade unions. Organizations with 15 to 149 members and from 150 to 500 members also had a significant share in the membership structure (27% and 24% respectively).

Considering the whole Poland, the unionization is declining. In 1991 it reached 19% and in 2000 – only 9%. Another major drop took place in 2005-2007, when for the first time it reached only 6%. According to A. Rozwadowska (2017), unionization (measured as an adult population share in the total population) amounted to 5% in 2017. Based on the Central Statistical Office data, trade unions associated 1.6 million members in 2014 – 5% of all adult Poles and 11% of the employed. The data provided by CBOS for 2017 brings exactly the same numbers. The worker-participation.eu website provides similar statistics – with an 11-percent employees' engagement in unions in 2015 Poland falls towards the end of the ranks compared to other European countries – preceding only Estonia and Lithuania (10%) as well as France (8%). The results of the *Diagnosis of the current situation of women and men aged 50+ on the labour market in Poland* (Krynska et al., 2013) indicate that almost every third employee over 45/50 works in a company with active trade unions\*, about 13% of employees over 45/50 belong to those unions - more often these are women (14.4%), than men (12.3%). The degree of involvement decreases with age 50+.

Men comprise 54% of all trade unionists. The distinct dominance of men was observed in the sections such as construction, mining, energy production, water supply, agriculture and transport (they constitute about 80-88% of members). Feminization, on the other hand, was very noticeable in trade unions operating in health protection and social assistance (79%) as well as financial and insurance activities (73%). In addition to employees, trade unions also associate pensioners – in 2014 all surveyed trade unions declared that a total of 126,000 retired people belonged to the union. Hence, they accounted to 8% of the total number of trade union members.

### **The main trade unions' activity areas and active aging**

Out of all types of conducted activities, the trade unions surveyed by the Central Statistical Office (2015) had to define one activity – the most important from the time they devoted to it in 2014 point of view. They most often indicated participation in the creation of a collective agreement, work regulations, ethical codes etc. (24%) and then supervising the functioning of the social fund (23%). Workplace organizations pointed to these two types of activities as the most time-consuming as well – 25% and 26%, respectively. In turn, the largest number

of inter-company organizations indicated their participation in the creation of a collective agreement, work regulations, ethical codes, etc. (23%), but the second in number was the group of entities devoting most time to intervening in the cases of the violation of laws, regulations, standards and ethical codes (19%). On the other hand, higher-level organizations usually dealt with counseling and legal assistance in the field of employee rights (28%), interventions regarding violations of laws, regulations etc. (21%) and giving opinions on public authorities' policies, consultations on legal acts, etc. (18%).

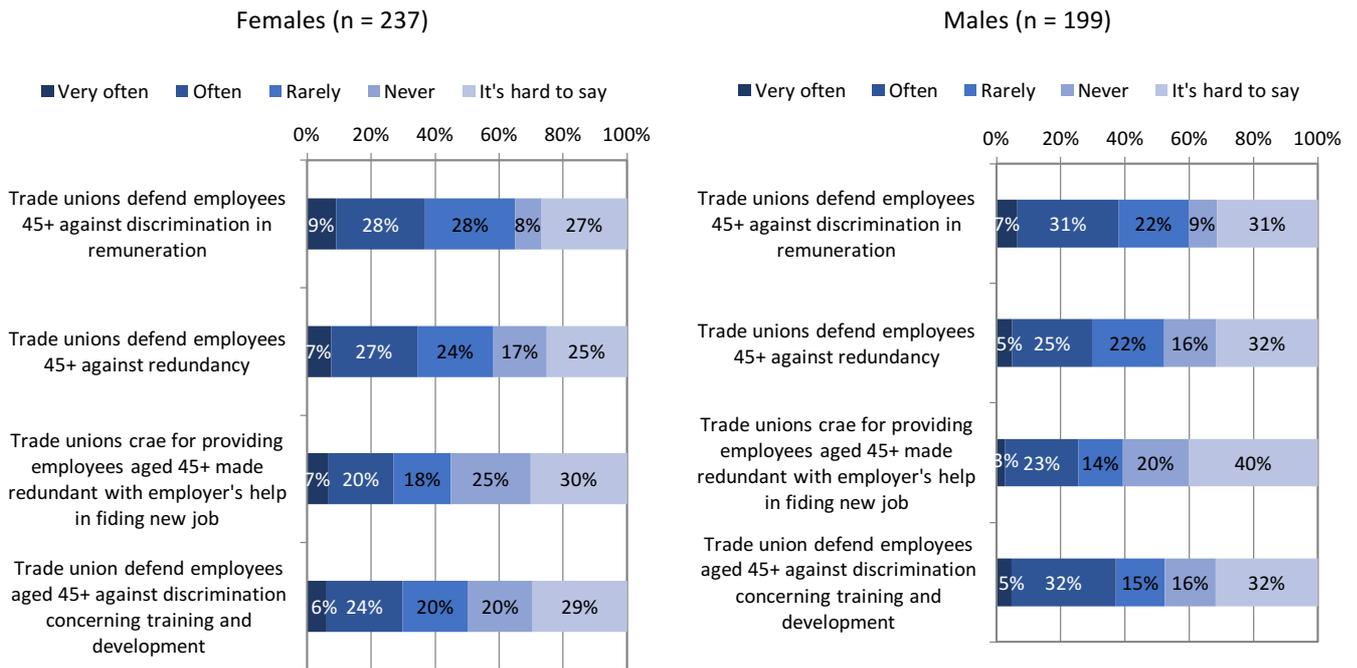
The issues of representing the interests of older employees, particularly those of active aging, did not comprise the subject of the conducted research. On the contrary, a review of documents resulting from the social dialogue (Urbaniak, Koziarowicz, 2011), carried out within the framework of the *Equal Opportunities in the Labour Market for People Aged 50+* project, indicate the trade unions' involvement in defending retirement privileges instead of promoting employment for those over the age of 50. Trade unions (NSZZ "Solidarność", All-Poland Alliance of Trade Unions) as well as employers' organizations joined the 50+ Social Council to jointly develop the updated Government Program *Solidarity of Generations. Measures to increase professional activity of persons aged 50+* in operation since 2013. The Program emphasizes, among others, the importance of trade unions involvement in activities in the area of active aging by creating permanent cooperation networks (based on regional programs and projects) for the employment of people aged 50+.

Employees assess their trade unions fairly critically. 43% claimed that regardless of their efforts, unions manage to achieve little, 41% of Poles believe that trade unions fail to effectively defend workers' rights, 34% feel the absence of employee representation in the workplace at all. Only 14% of respondents, evaluates actions undertaken by trade unions' as effective (CBOS, 2017).

In the case of the assessment of the trade unions' activity on a national scale, 45% admit it is "hard to say". This comprises a 20 percent increase as compared to 2015. Though 30% of employees (39% in 2015) are of the opinion that the activities of the unions are beneficial at the central level, 25% finds them unfavorable. Importantly, the older Poles (aged 55-64) are the most critical when it comes to the negative consequences of trade unions activity for the situation in the country (CBOS, 2017). What is more, the most harsh criticism is made by the unionists themselves (about 60%) as they expect even better effectiveness in their rights' defense and greater influence on the authorities' decisions (CBOS, 2017).

In the light of *Diagnosis of the current situation of women and men aged 50+ on the labour market in Poland* (Krynska et al., 2013), people aged 50+ indicated that the trade unions are not so much involved in matters important to this group (fig. 6).

**Figure 6. Subject and scope of support provided by trade unions to employee aged 45+ (in %)\***



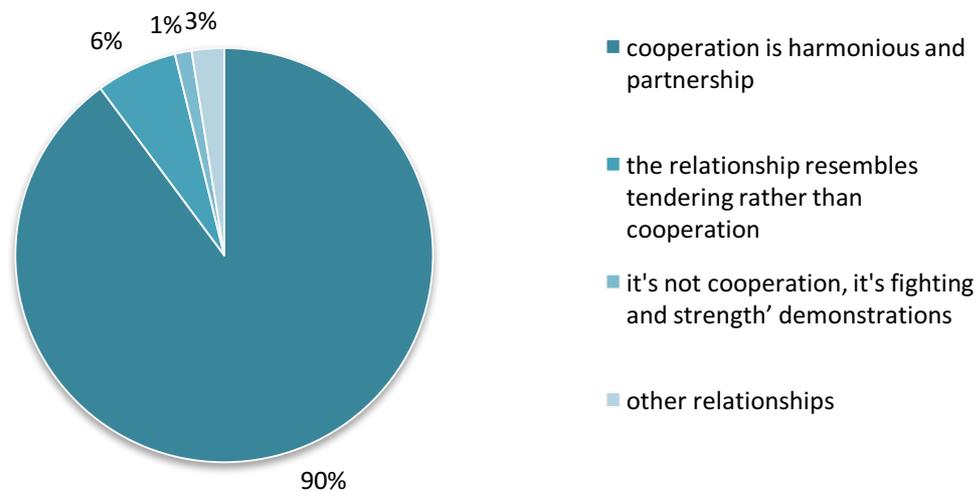
\* Applicable to people employed in companies where trade unions operate.

Source: Urbaniak B. (2013), Attitude of employers and women and men aged 45/50+ to the institutional support of economic activity after 45/50, [in:] Krynska E., Krzyszkowski J., Urbaniak B., Wiktorowicz J. (eds), *Diagnosis of the current situation of women and men aged 50+ on the labour market in Poland*, pp. 243.

On average, one third of unions does not have any recognition in this (29-36%) area. Another group, representing 33 to 39% of the total of respondents, is of the opinion that trade unions never or rarely deal with the issues of women and men over 50. Other people believe that unions are interested in these matters "often" or "very often (27-38%)". They defend employees over 50 against lay-offs, sometimes they care, whether the employer helps dismissed employees to come back to work. These conclusions are analogous for both genders in different age groups. Only women are more positive about the activities of trade unions when it comes to defending against discrimination in respect to training and development of employees over 50 (answer "often" or "very often" was given by 37% of women and 27% of men).

The assessment of cooperation with trade unions in SMEs is inspiring. Respondents declaring cooperation with trade unions claim that it is harmonious and based on partnership principles (90%) – fig. 7.

**Figure 7. The distribution of responses to the question about cooperation with trade unions (% , n = 79)**



Source: internal material of the STAY project.

The Act on Trade Unions regulating the mutual relations between the employer and the trade union contains only general statutory formulations. The principles of cooperation in this regard may be specified in collective agreements. Regardless of the level of formalization of relations between trade unions and the employer, it must be noticed that both sides should follow the principle of good faith in mutual relations. Just as the trade union should commit not to be demanding for objective reasons impossible to meet by the employer and comply with these obligations, so the employer should commit to respect union rights, respect the provision of the right to information. The trade union as a workers' representation in a workplace plays an important, social-building role. Only 6% of companies from the SME sector with trade unions perceive cooperation with them in negative terms, describing it as a tender showing lack of equality of the parties.

## Active ageing in the light of Aspire project

The analysis of websites of the key national union organizations did not confirm that they have noticed the problem of active aging nor they would to join the process of creating a valuable, high quality and healthy work environment. Unions of employers present reports and elaborations on topics related to active aging. Interviews in Aspire project (N=4) shows, that the problem of active aging is nothing new to the respondents: (...) *visible in the problem of the succession of Polish companies, because businessmen who founded their companies before and during the transition are currently at the age of retirement and naturally they would like to pass their life achievements to the younger generations* (EMP\_1). At the same time an antagonistic approach towards the trade unions may hinder this dialogue: (...) *the relationships are a relic of the past, but here they could find their mission through training, the support of such employees, the awareness of the organization of the action*

(EMP\_1). But sometimes they are not familiar with the topic: *I first meet with the term "active aging in the workplace" (TR\_2) and even misunderstanding: Where does the term "aging in the workplace" come from? What do the social partners do at work? Do they have to force the employer to work out a network of employment based on age and experience of employees? Do you introduce such activities (both in the workplace and outside), so that age does not determine the suitability of the employee? (TR\_2).*

Unions of employers that were subject to this research similarly to trade unions notice the problem of aging of the human resources, especially regarding the shortage of workers on the market. This problem is also seen in the category of succession in the companies in which the owner is gradually retiring and passing the business to his successors. Respondents declare that all actions related to active aging are precious and needed.

In 2017 the Bureau of the President of Republic of Poland prepared an amendment to Act on labour market institutions and employment promotion. The amendments were related to financial incentives for employers who are interested in age management' implementation. The amendments weren't introduced due to lack of acceptance of the government and to no chance to be introduced in the Parliament. Representatives of the biggest workers and employers unions were invited to co-work in process of the amendments' preparation. Workers union representatives were acquainted with theoretical backgrounds of age management and some of them had experiences with international projects related to the management approach. Also employer union representatives declaratively had basic information about age management, and one of them had private experiences collected when worked at his basic position.

The overview of the most important issues related to the development of active aging thanks to the social partnership and industrial relations presented in this report shows that this issue is becoming more and more important. there are good age management practices, social partner initiatives and other stakeholders are taken. However, the demographic situation and the situation of people aged 50+ in the labor market and forecasts of this situation in the near future indicate the need to intensify activities and introduce the subject of active and healthy aging to scientific discourse, but above all to practice management. Both trade unions and employers' representatives have a key role to play here, dialogue between them can certainly be more effective and postulates are much more audible.

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