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AGE MANAGEMENT – A REMEDY FOR POPULATION AGEING?

1. INTRODUCTION

Population ageing is one of the major challenges of modern Europe. This necessitates a greater inclusion of people aged 50+ in the labour market. In this context, very low economic activity of Poles (especially women) nearing retirement is a huge challenge faced by the Polish economy and Polish enterprises. One of the main directions of supporting economic activity of senior people is age management.

The subject of this study is the evaluation of efforts to promote maintenance of senior people in employment. The authors refer to empirical studies on the labour activity of people at pre-retirement stage. The aim of this study is to present instruments of age management and their use by Polish enterprises.

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2. GENERATION 50+ ON THE LABOUR MARKET – POLAND VS. OTHER EUROPEAN UNION COUNTRIES

A rapid process of population ageing can be observed in Europe over the last three decades. In 2010, 17.4% of the EU-27 was aged at least 65, while in Germany and Italy this percentage was over 20%. Polish society is relatively young – the

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percentage of people aged 65+ in 2010 was 13.5%, while the median age reached 37.7 years (compared to EU median 40.9 years) (Demography Report 2010, p. 63). However, even in Poland, unfavourable demographic trends can be observed. In 1995–2010, the number of working age people increased by over 1.8 million. The group which grew most from 2000 to 2010 (by 15.4%) was composed of people of immobile working age (see table 1).

Table 1. Trends of changes in Polish population by economic age groups in 1995–2035

Population	1995	2000	2004	2010	2010– 2015	2015– 2020	2020– 2025	2025– 2030	2030– 2035
	number of people (thousand)				predicted changes in the number of people (thousand)				
Total	38,284	38,254	38,174	38,200	–75.9	–186.2	–391.8	–642.1	–803.0
at:									
Pre-working age	10,180	9,333	8,087	7,140	–189.5	41.5	–143.0	–563.9	–620.5
Working age	22,809	23,261	24,240	24,615	–852.8	–1215.2	–877.6	–370.6	–515.0
Mobile (18–44)	15,307	15,281	15,257	15,334	–288.7	–933.0	–1249.5	–1198.4	–789.9
Immobile (45–59/64)	7,503	8,043	8,983	9,281	–564.1	–282.1	371.9	827.8	274.9
Post-working age	5,295	5,660	5,847	6,445	966.4	987.5	628.8	292.4	332.6

Source: Local Data Bank and *Demographic Yearbook of Poland* (2011), p. 153.

Eurostat's population projections foresee that the ageing process will continue in future decades. According to Eurostat, in non-immigration variant, by 2060 the size of EU-27 working age population (aged 15–64) will decrease by 33%, while the number of people aged at least 65 will increase by 64.3%. The median age in UE-27 is projected to rise to 47.9 years by 2060, and the age dependency ratio – to 95.5% in 2060 (Demography Report 2010, p. 65). In Poland, a quick increase in the levels of dependency ratio, predicted to start in the next decade, will result from the increase in the number of post working age people (in 2035, the dependency ratio is estimated to be 74; there will be 46 people of post productive age and 28 people of pre productive age per 100 people of productive age). This significant increase of demographic burden with subpopulation in post-productive age determines the need for action aimed at delaying the exit from the labour market (at present the average age of exit from the labour market and starting retirement or disability benefit by men and women is around 59 years compared to the EU-27 average – 61.4 years according to Eurostat).

The progressing ageing of labour force is currently one of the most important determinants of the situation on the labour market. As table 2 shows, Poland – together with Hungary, Latvia, Portugal and Malta – is among the countries

with the most difficult situation of people approaching senior age in the labour market.¹

Table 2. Classification of the European Union countries – qualitative and quantitative approach

Classification by social capital level		Classification by synthetic coefficient	
Group I	Denmark, Finland, Sweden	Group I. The best situation of people aged 45+	Denmark, Netherlands, Sweden, United Kingdom
Group II	Austria, Belgium, France, Germany, Ireland, Luxembourg, Netherlands, United Kingdom	Group II. Good situation of people aged 45+	Austria, Czech Republic, Cyprus, Finland, Germany, Ireland, Luxembourg,
Group III	Cyprus, Greece, Italy, Malta, Portugal, Spain	Group III. Rather poor situation of people aged 45+	Belgium, Bulgaria, Estonia, France, Greece, Italy, Lithuania, Romania, Slovakia, Slovenia, Spain,
Group IV	Bulgaria, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovenia, Slovakia	Group IV. Difficult situation of people aged 45+	Hungary, Latvia, Malta, Poland, Portugal

Source: own elaboration on the basis Szukalski and Wiktorowicz (2011).

The low position of Poland in the ranking presented in table 2 results from particularly low economic activity rates of people in pre-retirement age group – only 49.2%. In the age group 55–64 in the EU-27 this ratio is 49.7% (58.9% for men and 41.1% for women). In Poland, the rates are much lower – 36.7%, including 48.9%

¹ This classification was based on a synthetic ratio, developed according to the methodology proposed by J. Drewnowski (OECD 2008). As diagnostic variables the following indicators were adopted (for 2008–2009): economic activity rate at the age of 50–64 (in %), average labour market exit age, long-term unemployment in the age group 55–64 (% of those unemployed in a given age group who have been out of work for more than 12 months), the unemployment rate at the age 50–64 (% of active population), the employment rate 50–64 years (% of people in that age group), people with secondary or higher education aged 55–64 (as % of people in this age group), participation in any form of education claimed by people aged 55–64 (% of participants), participation in formal education by people aged 55–64 (% of participants among total number of people in this age group), self-assessment of health condition by people aged 55–64 in 2008 (% of total ‘good’ and ‘very good’ responses), people with chronic diseases or health problems as % of employees aged 55–64 (% of total employed at this age), the ratio of median income at the age 50–64 to the median income for total population, at risk of poverty rate of people aged 60+ (% of people with income below 60% of median income), risk of poverty rate of employees aged 55–64 in 2008 (% of people with income below 60% of median income). The list of variables was proposed by Szukalski and Wiktorowicz (2011).

for men and only 25.9% for women (for women aged 55–59 – 36.3%, according to BAEL 2011). This places Poland at the bottom of the ranking (only Malta, and from 2010 Slovenia are lower ranked). Still less favourable is Poland's position in terms of employment among the population aged 55–64. The employment rate in this age group has reached the median of 34%, of which only 24.2% for women (compared to the average 46.3% for EU-27, of which the rate for women is 38.6%). It should be noted though that positive trends have been observed in the EU-27 as well as in Poland, which is reflected in the increase of both these indicators.

It should also be noted that in terms of social capital, which provides the social, cultural and institutional context for the situation of people nearing senior age in the labour market, Poland is similar to other countries in our region, and also to the countries of Southern Europe, while the largest distance divides Poland from the Scandinavian countries. Looking for patterns in the field of age management in enterprises, one can therefore expect that the most adequate to the Polish conditions are the solutions proposed by companies in the countries of Central, Eastern and Southern Europe.

3. MEASURES TO MAINTAIN SENIOR WORKERS IN EMPLOYMENT – THE ROLE OF AGE MANAGEMENT

The issue of active ageing is widely addressed by EU institutions. The desired directions of measures to improve the disadvantaged situation of population nearing senior age include maintaining economic activity of employed people. According to Europe 2020 Strategy, the employment rate of people aged 20–64 years should increase to at least 75%, also due to increasing the number of working senior people (Europe 2020, 2010). In light of the recent findings, the most effective strategy for solving the problem of ageing population in Europe is considered to be the widest possible use of existing employment potential, which in turn requires common implementation of policy for creating opportunities for participation in the labour market. This policy covers shaping of work conditions adjusted to the needs of senior workers, developing professional education, training and development plans, creation of high-quality and high-efficiency jobs, providing effective social security systems and adoption of multifaceted measures for reconciliation of professional and family life etc. (European Economic and Social Committee, 2011). Activities in this field have also been included in the 'Solidarity of the Generations' programme implemented in Poland (since 2008), focusing on measures to increase the work activity of people aged 50+. The programme provides multifaceted support for the economic activity of people of pre-retirement age, so that by 2020 the

employment rate for people aged 55–64 reaches 50%. One of the directions of the actions taken is age management.

Age management is an approach to personnel management in the organization, taking into account age, the ageing process and life cycle of individuals, in order to create a working environment favourable to employees of all ages, allowing the use of their capabilities and satisfaction of their needs (Walker, 1998, 2005; Eurofound, 2006b, 2011; OECD, 2006; Urbaniak, 2007; Silverstein 2008). It involves a set of activities within the company which allow rational and efficient use of available human resources, including senior workers (Litwiński and Sztanderska, 2010, p. 7). Age management can also be defined as part of personnel policy which covers activities and practices addressed primarily at older workers (Mól, 2008, p. 5). The challenge for enterprises in their human resources management consists of shifting from management by age to a management where all generations work together and learn from each other. Enterprises must be attractive for older workers, so that they see the extension of their professional life as a fulfilling opportunity that adds value to their skills rather than as an obligation. If a business can offer its employees a satisfying career regardless of their age, if it is able to invest in their training and in the development of their skills at any age and until the end of their career, employees will find the motivation to stay committed to their work for a longer period of time (Descamps, 2011, p. 21). What is more, employment of representatives of different generations, aiming for a balanced age structure, enables organisations to respond better to changing market conditions and adapt products to the customers of different ages (Liwiński and Sztanderska, 2010). It should be remembered that the average age of the clients of our services and products is steadily growing. This lays foundations for a more dynamic development of the so-called silver economy. Teams consisting of members in diverse ages are more productive and creative, solve problems faster, and working in them prevents routine.

Age management also allows reduction of costs associated with additional labour costs being the consequence of unbalanced age structure of the staff. This implies increasing both older and younger employees' motivation to work due to good working atmosphere and reducing inter-generation conflicts as well as reduction of labour costs, for example, by lower absence of senior workers, obtained due to health prevention and adaptation of working time to the needs of workers aged 50+, reducing business costs through transfer of knowledge and experience to younger workers from their older colleagues (ARF, 2010, pp. 49–50).

The combination of experience and competence of the seniors and enthusiasm and new skills (e.g. in IT) of younger workers brings the effect of synergy – solutions worked out together are more innovative, while productivity also increases (Jaros *et al.*, 2011, p. 203). Moreover, in some cases, older workers, precisely because of their age are more desirable employees. It is crucial to retain in a company invaluable pragmatic knowledge of older workers, which is the result of theoretical

knowledge filtered through years of practical experience and the possibility of its transmission to younger generations.

What action then should be taken by companies that want to introduce age management? Age management involves recruitment and education, training, development and professional-work advancement, promotion and internal transfers among positions, payment policy, health prevention, ergonomics and work organisation, flexible forms of employment, termination of employment policy, and changing attitudes towards elderly employees (see: Litwiński and Sztanderska, 2010, pp. 23–25).

Falling worker efficiency can be partially balanced by modifications in work organisation, proper training, action in the field of health prevention and more effective use of technologies related to a job position. Main age management tools include customised to the needs of mature workers way of work organisation and its management by employers. Companies must introduce innovative forms of work organization to retain valuable employees and prevent them from early leaving, and also use other measures to enable older workers to work efficiently. Increase in employment opportunities through the use of flexible forms of work organization – such mobile and remote working, job sharing, part-time and telework – can and should translate into a more flexible approach to retirement. Another aspect, whereby the employability of workers may be preserved, is raising the skill level through education and training.

Investment in lifelong education and training cannot only help fill gaps resulting from leaving of older workers, but also – by increasing workers' flexibility – provide them with protection against the risks of potential job loss. These activities are usually associated with the use of solutions, such as mentoring, tutoring or coaching. In case of senior workers, not only investing in their education is particularly important, but also using their knowledge and experience in training of their younger colleagues, which contributes to intra-organisational learning, thereby increasing business competitiveness. Intergenerational transfer of knowledge should be followed by: (1) mentoring and coaching by employees, (2) job sharing between employees who may be staying and those who may be leaving, (3) job rotations and shadowing, (4) handovers through planned arrangements, such as phased retirement, and (5) team-based approaches to managing long-term projects (Greenes and Piktialis, 2008).

4. AGE MANAGEMENT – EXPERIENCES OF POLISH ENTERPRISES

Age management is still a novelty in Polish conditions. As results from the few national-level studies on this issue (ASPA employer survey, 2011), 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 remaining 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% – support 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.

It is also worth noting that it is difficult to talk about a comprehensive approach to age management in Poland – more than half of the companies have at most one solution, while only 14% of companies use at least four. Research shows clearly the lack of age-management culture in Polish organizations. Comparing the results of a survey conducted in the framework of ASPA in Poland with other countries (see table 3), it is clear that the situation in this area is highly diversified.

Table 3. Age management measures used by enterprises, by country (in %)

Specification	Denmark (n = 609)	France (n = 500)	Germany (n = 892)	Italy (n = 770)	Netherlands (n = 1077)	Poland (n = 1037)	Sweden (n = 525)	UK (n = 875)	Total (n = 6285)
<i>Development</i>									
Continuous career development	27	36	35	9	25	22	23	8	21
Training plans for older workers	7	46	18	2	8	37	7	44	20
<i>Utilization</i>									
Promoting internal job mobility	20	38	13	13	16	27	29	27	21
<i>Maintenance</i>									
Flexible working hours	–	25	45	12	32	29	42	–	30
Ergonomic measures	28	28	20	5	28	38	32	31	26

Source: ASPA (2011).

In all researched countries employers most frequently implemented flexible working hours as a measure intended to accommodate older workers (Poland is

a little below the mean). Among the age management tools, training plans for older workers, ergonomic measures and promoting internal job mobility are clearly more frequently used in Poland. It is worth pointing to a high rate of early retirement or part-time retirement in comparison to other countries (especially in comparison to the UK and Denmark).

The research carried out several years earlier shows that every third company does not use any solutions in this field. Only about 10% of employers use strategies to keep older workers, and less than 5% – strategies of their recruitment (Ageing Workforce Conference, 2011). Many employers do not monitor the age structure of their staff – they do not know the number of people who retired over the last three years, nor how many people are in the pre-retirement age (MPiPS, 2008).

As mentioned earlier, Poland lacks comprehensive studies on age management. It is, however, worth relying on partial results of studies covering this issue to a minor extent. They lead to the following conclusions:

1. Work Ability Index – WAI is significantly higher if the organization implements varied age management tools (project *Labour Market and Unemployed People Aged 50+. Opportunities and Barriers*, Operational Programme Human Resource Development – OP HC).

2. Employees aged 45+ who are most often involved in trainings are those who are better educated and possess relatively high qualifications; they are mostly the younger individuals from the age group 45+ (project *Older People on the Labour Market in Kujawsko-Pomorskie. Development Trends and Activation Opportunities*, OP HC).

3. People aged 45+ significantly less often than younger people feel the need for further professional development, their expectations for flexible working time and working from home are similar, however, they value to a larger degree independence and adaptation of work to their professional skills (project *Social Diagnosis*, OP HC).

4. Senior workers are not discriminated in the area of training, however, they take part in them relatively rarely (just as representatives of other age groups) (project *Opportunities and Barriers to Employment of People Aged 45+ in Pomorskie Province*, OP HC).

5. Career development of employees aged 45+ significantly benefits from cooperation with job coach – individual job counsellor who together with the employee develops individual career plan and support the employee during its realization; job coaching brings particularly good results when the job coach comes from the same enterprise (e.g. a person aged 45+ who acquired new qualifications when endangered with losing the job) (project *Alliance for Work*, EQUAL Community Initiative Programme).

6. Companies lose much the moment older employees retire – no transfer of knowledge can lead to disorganization of the company, destabilise business

processes and extend the process of introducing new/younger employees; companies lose much of the accumulated knowledge and lose role models. The most common form of knowledge transfer is tutoring and trainings, only one fifth of the companies has implemented mentoring (project *SISC-Senior Intergenerational Social Capital*, LLP).

7. Age management is the area of management very poorly recognized, especially by smaller enterprises (project *Age Management Methodology as an Innovative Way Contributing to the Economic Activity of Employees Aged 50+*, OP HC),

8. Older and younger workers should be integrated, because this brings benefits for both workers and the enterprise – seniors share with their younger colleagues their professional and life experience, bring in calmness and distance, while the young provide help for older people in tasks requiring physical effort, contribute to freshness of view and bring creativity to cooperation, distract the elders from the routine course of action (project *Comprehensive programme of activation of the people aged 50+*, OP HC).

9. Older workers in most companies transfer professional skills to younger people, but they are rarely interested in participating in the training process, mainly due to negative opinion about their effectiveness (for 2/3 trainings failed to improve working conditions, for more than 80% – they did not result in pay rise or promotion) (project *Age Management and Counteracting Age Discrimination of People over 45 as a Response to the Problem of Ageing of Human Resources in Lubelskie Province*, OP HC).

10. People isolate themselves in their own age group, while employees aged 50+ feel the need to get closer to and support younger colleagues; intergenerational integration, improvement of psychosocial skills can solve problems of barriers and prejudice among generations, and open opportunities for mutual learning (project *Dynamism and Experience – Common Change Management*, EQUAL Community Initiative Programme).

11. Lack of knowledge transfer makes the young, less experienced employees continue business activity often committing errors that have occurred in the past and could be eliminated provided there existed a corresponding transfer of knowledge (project *Mentoring 50+. Innovative Use of Potential of Mature Workers for Human Resource Development*, OP HC).

12. More and more companies implement mechanisms for transmission of knowledge by older workers. Most often it is a system of internal training and mentoring in which newly hired workers are introduced to the functioning of the company by older workers. Some companies create multigenerational teams, which encourages the exchange of knowledge and information, an even smaller percentage keeps work archives and the projects of each employee (project *People Aged 50+ on Mazovia Region Labour Market*, OP HC).

5. CONCLUSIONS

Poland, like other European Union countries, faces a serious problem of ageing labour force, which requires longer remaining in employment. The action currently undertaken in Poland to shift the statutory retirement age to 67 years (from the current 65 years for men and 60 for women) is certainly an important step in this direction. In parallel, however, there must be implemented modern standards for managing diversity – also in terms of age. This is particularly important on the Polish labour market, where the situation of people of pre-retirement age is one of the worst in Europe. This requires multifaceted actions targeted at employees, but also at the unemployed and economically inactive. The programme currently implemented in Poland ‘Solidarity of generations’ takes into account all these dimensions.

The analysis of the projects conducted in Poland under the European Social Fund and addressed at 50+ issues showed that compared to the group aged 45/50+, issues related to the development of staff competencies were implemented earliest and in the widest range (Urbaniak and Wiktorowicz, 2011). However, age management still appears rather an innovative subject. In the context of the quoted results of empirical analyzes, it is not surprising at all. Based on the quoted studies, there emerges a picture of initial development phase of this area of management in the Polish enterprises. Therefore, there still remains a lot of room for continuation of analyzes in the field of age management. Given the challenges of the development of knowledge-based economy, it seems particularly important to conduct studies on the transfer of knowledge between older and younger employees. This will, on the one hand, help to preserve employability of older workers, and on the other – provide a more sustainable organization development. Age management seems to be really a remedy for poor employability of older workers and should constitute an important element of active ageing. This cannot obviously be a solution to population ageing in Europe, however, it may be an important way to mitigate its effects. As is well known, economic and social activity go hand in hand, preventing social exclusion of senior social groups.

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