

Regional Active Aging Index for Poland¹

Executive Summary

This expertise about the regional active aging index in Poland have been prepared for Senior Citizen Policy Department of the Ministry of Labor and Social Policy. It is focused on concept of “active aging”, which have been analyzed on the regional level of the whole country. To prepare this index we have been inspired and so we tried to follow the approach of Active Ageing Index (AAI) proposed by Zaidi et al (2013)². In Polish approach of constructing active ageing index in regional perspective, we used the concept of the original AAI index and four domains were included:

- Employment,
- Participation in society,
- Independent, healthy and secure living,
- Capacity and enabling environment for active ageing.

The main goal of this expertise was to present the active ageing index at the regional level in Poland.

In case of Poland, it is important to change the way we look, treat and understand the active ageing and as a result the potentials of senior citizens in our society could be better used. The regional active ageing index could be so the alarming signal for policy makers to see in what stage their regions are and where is a need to make changes in the policies related to active ageing.

1. Introduction

Public policy focusing on active ageing is still an issue for the future in Poland. The discussion about the concept of the active ageing policy and related senior policies are still relatively new in Poland (Perek-Białas, et al, 2006, Ruzik et al, 2013). It has to be stressed that from the beginning of analysis of active ageing policy in Poland (ActiveAge Consortium, 2005, Perek-Białas, 2005) it was always underlined that the active aging cannot be dedicated only to professional productivity (at the labour market), but it also needs to include the other activities (as voluntary work, for family etc.). The recent analysis of what has been done and what is going on (like the new Department of Senior Policy in the Ministry of Labour and Social Policy) in Poland also due to the EY 2012 of Active Aging and Solidarity Between Generations showed that the impact of EU policy on making the ageing policy in Poland could be confirmed (Ruzik-Sierdzińska et al, 2013).

¹ Jolanta Perek-Białas, Elżbieta Mysińska, *Indeks aktywnego starzenia w ujęciu regionalnym*, ekspertyza wykonana na zlecenie Departamentu Polityki Senioralnej, Ministerstwo Pracy i Polityki Społecznej, Warszawa, 2013 [in Polish].

² Zaidi, A., K. Gasior, M.M. Hofmarcher, O. Lelkes, B. Marin, R. Rodrigues, A. Schmidt, P. Vanhuyse and E. Zolyomi (2013), ‘Active Ageing Index 2012: Concept, Methodology and Final Results’, Methodology Report Submitted to European Commission’s DG Employment, Social Affairs and Inclusion, and to Population Unit, UNECE, for the project: ‘Active Ageing Index (AAI)’, UNECE Grant No: ECE/GC/2012/003, Geneva and link checked in March 2013: <http://www1.unece.org/stat/platform/display/AAI/Active+Ageing+Index+Home>.

And thanks to actions of European Commission, the subject of senior citizen policy have started to be very important issue for EU member countries (see EY 2012), including Poland. One of important action of the Directorate General for Employment, Social Affairs and Inclusion, with the Population Unit of the United Nations Economic Commission for Europe and the European Centre for Social Welfare Policy and Research in Vienna was a preparation of the overall active ageing index for European countries.

According to authors (Zaidi et al, 2013) the before-mentioned index supposes to be a “*tool to measure the untapped potential of older people for active and healthy ageing across countries. It measures the level to which older people live independent lives, participate in paid employment and social activities as well as their capacity to actively age*”³. It gives a possibility to check, which countries are the best in realization of the active ageing policy. In other words, the index was invented to show on what level the citizens are able to be professionally active and to live independent, healthy and secure life and also to find new possibilities for active ageing and so the senior policy in European countries.

The afore-mentioned actions resulted in building of the specific country index, which indicates leader countries in making of active aging policy. The Eurostat data from years 2010 and 2011 were used to create before-mentioned index and in most of examples they were prepared for people over age 55 and 65+.

The Active Ageing Index covers four domains as follows:

1. Employment.
2. Participation in Society.
3. Independent, healthy and secure living.
4. Capacity and enabling environment for active ageing

Unfortunately, according to AAI Poland is on the last 27th position in the ranking - on the list of the EU-countries, which were included in this project.

That's why the main goal of the regional expertise of active ageing index in Poland was to check and show how large differences in these domains there are between regions of the country and to check if there are available data which allow to easily monitor not only the current situation in areas important for active ageing policy and senior policy but also to see changes in these policies over time. It also should help to identify in which region of Poland there is a need to support seniors, and to make an intervention to change the position of region and as well to change the overall position of country in European ranking.

The Active Ageing Index for Regions of Poland was prepared as much as possible (due to availability of data and access to them) as original AAI for Europe. The same like in the European AAI, the Polish Regional index also covers four main domains mentioned above. And mostly we based on secondary and available data from the Central Statistical Office or from the selected national representative sampling surveys for which the analysis were performed if it was needed. The data used is mostly from 2010 and 2011 as in original index also to make a kind of reference year before EY 2012 to see if and what can change over time if the analysis is repeated. The detailed description of used indicators (source of data, description of indicators, examples of exact questions and answers used in our approach) is available in Perek-Białas, Mysińska, 2013.

³ See relevant mentioned above web page with the description of the AAI.

Unfortunately, there was no possibility to use exact the same indicators as in original AAI, mostly due to lack of data at regional level of country. In such situation, there was provided a checking what information/indicator could be replaced here. And if only a substitution for other/similar information exists and if it was available, such approach was applied. Just in one or two cases the indicators had to be removed from the overall active ageing index (like employment rate of people over 70+).

2. Detailed description of domains of regional active ageing index.

Employment

First domain describes the employment rates of people in age 55+, with more specific age breaks up to 69. The employment rate over 70+ in Poland is very low, so only these three rates were used in analysis as shown below in Table 1. According to the definition of Central Statistical Office, as employed person is consider such one who had carried out a job, even for an hour per week, which brought them any income or who have helped for free in the regular home works in the farm or in any other household economic activity as well as who had a job but he/she was not able to do it because of sickness, holidays or any other reasons [the same definition as in the official documents and in the statistical system of the Central Statistical Office/Eurostat based on European Union-Labour Force Survey]. An important fact is that the afore-mentioned break in the work period, could not be longer than 3 months, unless they were paid employees and in the period longer than 3 months a person gets at least 50 % of their regular salary.

According to analysis of calculated at regional level, employment rates, the *Podkarpackie* region is a leader in Poland, where the rates of employment of older workers and senior citizens are the highest in the country. At the second place is *Mazowieckie* region and at the third place *Lubelskie* region.

The worst results in Poland are achieved in the north part of the country, with the following regions: *Kujawsko-Pomorskie*, *Zachodniopomorskie* and *Warmińsko-Mazurskie*.

Tabel 1. Employment

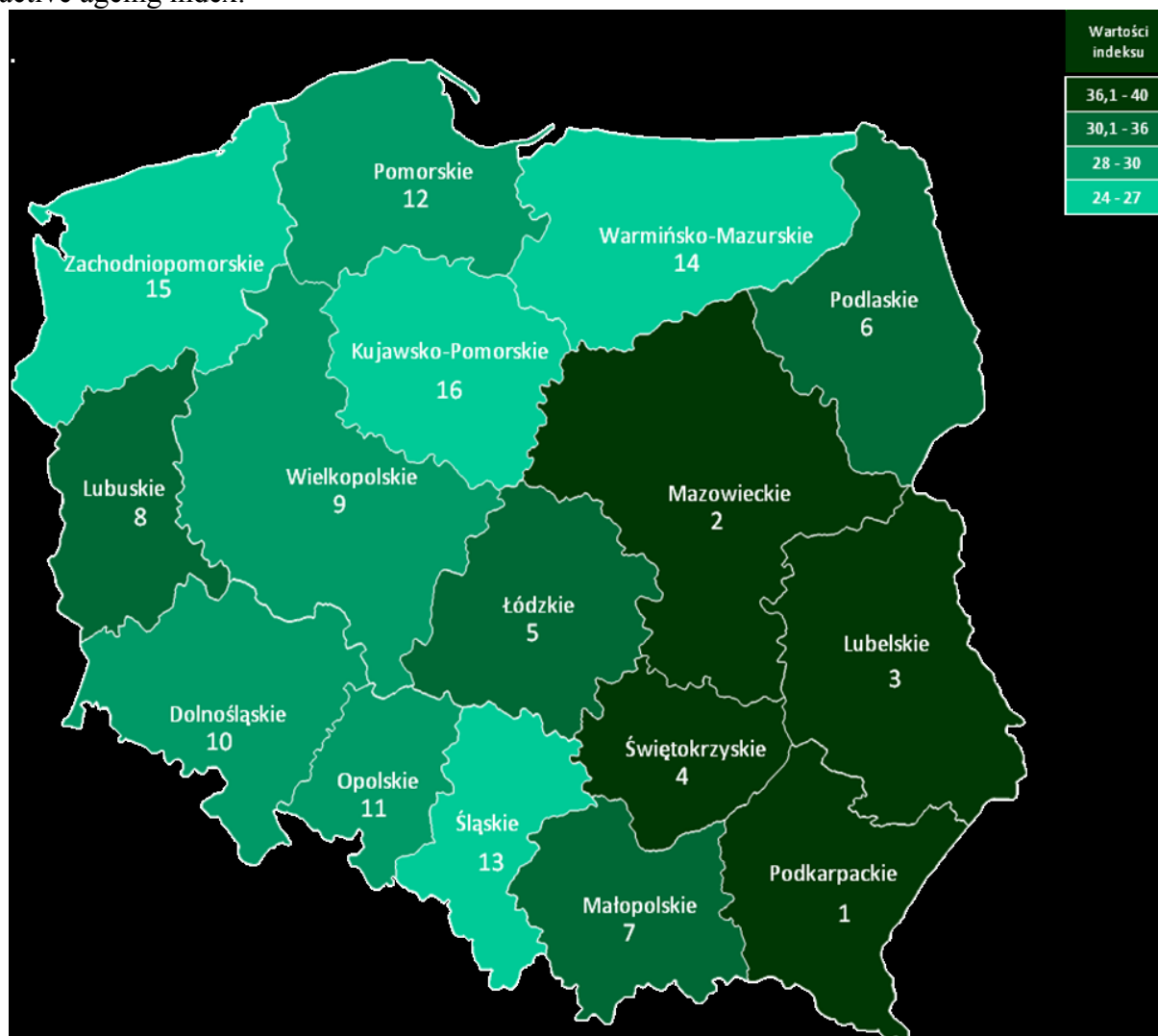
Employment		1.1 Employment rate 55-59	1.2. Employment rate 60-64	1.3 Employment rate 65-69	Index	Ranking
No.	Regions	CSO 2011	CSO 2011	CSO 2011	Value	Ranking
1	Dolnośląskie	47.0	18.6	3.0	29.7	10
2	Kujawsko-pomorskie	39.0	13.8	3.3	24.3	16
3	Lubelskie	56.9	27.9	7.3	38.3	3
4	Lubuskie	46.2	21.5	4.0	30.3	8
5	Łódzkie	57.5	21.7	4.6	36.2	5

6	Małopolskie	46.9	24.6	8.4	32.5	7
7	Mazowieckie	60.2	27.5	5.9	39.5	2
8	Opolskie*	47.4	18.7	-	29.3	11
9	Podkarpackie	57.8	29.3	10.2	39.8	1
10	Podlaskie	51.2	22.6	2.8	32.9	6
11	Pomorskie	43.6	21.1	3.5	28.9	12
12	Śląskie	44.9	16.0	3.4	27.9	13
13	Świętokrzyskie	55.3	26.0	6.2	36.7	4
14	Warmińsko-mazurskie*	44.0	19.3	-	27.8	14
15	Wielkopolskie	46.6	19.8	3.7	30.0	9
16	Zachodniopomorskie	39.0	17.3	2.7	25.2	15
Weights		50	30	20		

Due to lack of data for the persons in age of 65-69 for these regions the weights were 50, 50, 0.

Source: own preparation.

The map below shows the overall ranking of regions in **Employment** domain of regional active ageing index.



Source: own preparation

Participation in Society

In this area, the leader is *Lubelskie* region but the regions *Lubuskie* and *Małopolskie* are very close to the leader region.

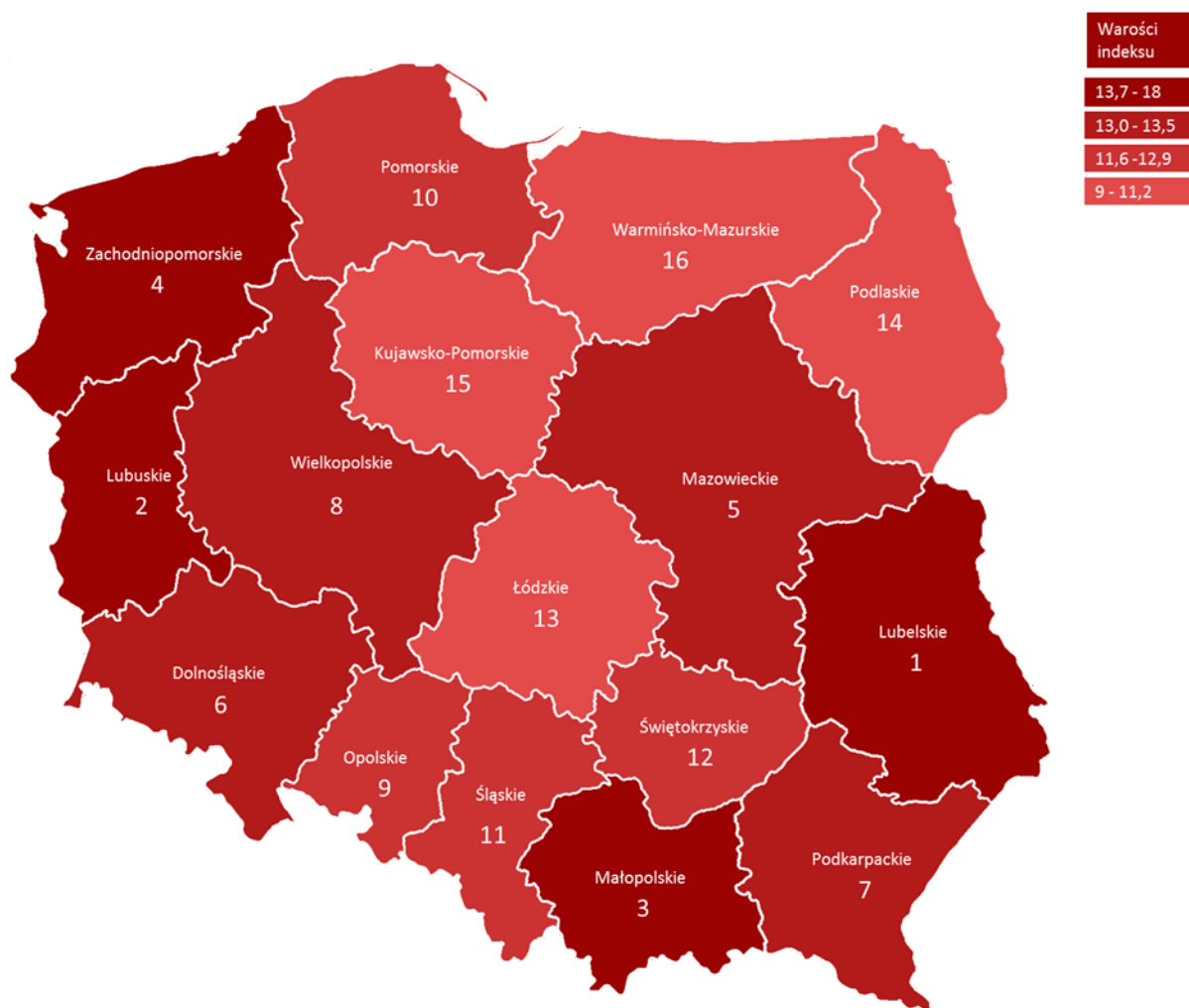
The worst results were gained by regions: *Warmińsko-Mazurskie*, *Kujawsko-Pomorskie* and *Podlaskie*.

Tabel 2. Participation in Society

Participation in Society		2.1 Voluntar y work (55+)	2.2 Care for children and grandchidlren (55+)	2.3 Care for other dependent and older people (55+)	2.4 Participation in public meetings (55+)	Index	Ranking
No.	Regions	DS 2011	PNZ 2011	PNZ 2011	DS 2011	Value	Position
1	Dolnośląskie	16.3	12.0	1.0	23.9	13.3	6
2	Kujawsko-pomorskie	11.9	11.0	2.0	19.0	11.0	15
3	Lubelskie	15.8	22.0	4.0	27.4	17.3	1
4	Lubuskie	22.1	17.0	3.0	23.9	16.5	2
5	Łódzkie	12.9	10.0	1.0	21.0	11.2	13
6	Małopolskie	16.9	15.0	1.0	22.6	13.9	3
7	Mazowieckie	17.6	11.0	3.0	22.4	13.5	5
8	Opolskie	16.7	9.0	3.0	20.6	12.3	9
9	Podkarpackie	18.0	9.0	2.0	24.1	13.3	7
10	Podlaskie	11.7	14.0	3.0	15.4	11.0	14
11	Pomorskie	13.5	9.0	4.0	21.8	12.1	10
12	Śląskie	13.4	11.0	7.0	16.5	12.0	11
13	Świętokrzyskie	15.8	8.0	3.0	19.4	11.6	12
14	Warmińsko-mazurskie	7.7	14.0	3.0	13.8	9.6	16
15	Wielkopolskie	17.2	10.0	2.0	22.9	13.0	8
16	Zachodniopomorskie	14.3	14.0	1.0	25.6	13.7	4
Weights		25	25	25	25		

Source: own preparation.

The map below shows the overall ranking of regions in this domain of **Participation in Society**.



Source: own preparation

Independent, healthy and secure living

To prepare the overall index in this domain, various indicators were used: sport/physical activity, lack of problems with accessibility to health care (dental equipment) and satisfaction from financial and material situation, use of computer and other IT technologies as well information about feeling safe in their own neighborhood.

Here, the leaders are: *Śląskie*, *Wielkopolskie* and *Mazowieckie* regions. The worst values were found in: *Świętokrzyskie*, *Warmińsko-Mazurskie* and *Podkarpackie* regions.

Tabel 3. Independent, healthy and secure living.

Independent, healthy and secure living	3.1 Physical activity (55+)	3.2 No need to refuse buying the dental equipment due to lack of	3.3 Independent living alone (75+)	3.4 Ratio of average monthly pension/average monthly salary	3.6 Satisfaction from material situation (65+)	3.7 Physical safety (55+)	3.8. Use of computer (55+)	Index	Ranking
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N o.	Regions	DS 2011	DS 2011	GUS 2011	GUS 2011	DS 2011	DS 2011	DS. 2011	Wart ość	Pozycja
1	Dolnośląskie	24.7	73.3	2.0	56.8	54.5	82.2	29.2	49.7	7
2	Kujawsko-pomorskie	21.5	80.3	1.6	51.6	56.5	86.3	21.2	49.3	8
3	Lubelskie	17.3	70.1	2.1	49.6	59.6	87.4	20.1	47.3	12
4	Lubuskie	25.1	69.8	1.7	51.0	55.2	87.8	20.2	48.1	9
5	Łódzkie	17.7	74.6	2.3	52.2	48.5	83.1	25.0	46.8	13
6	Małopolskie	18.1	81.5	1.5	54.6	60.5	87.4	20.7	50.3	5
7	Mazowieckie	23.7	76.3	2.2	57.8	61.3	85.3	28.9	51.7	3
8	Opolskie	24.2	74.6	1.7	55.2	57.8	90.4	16.6	49.9	6
9	Podkarpackie	16.9	72.5	1.4	47.9	53.9	92.1	15.0	46.5	14
10	Podlaskie	13.6	73.9	2.1	50.8	57.7	89.9	19.1	47.5	10
11	Pomorskie	24.8	68.6	1.6	55.8	64.9	86.2	27.6	50.7	4
12	Śląskie	23.4	75.4	2.0	69.8	69.3	79.3	26.4	53.9	1
13	Świętokrzyskie	10.5	66.5	2.0	50.3	61.0	80.6	13.9	44.4	16
14	Warmińsko-mazurskie	13.1	62.1	1.7	50.5	57.7	89.8	18.9	45.6	15
15	Wielkopolskie	24.7	79.7	1.4	53.5	66.7	91.1	26.7	52.8	2
16	Zachodniopomorskie	21.2	66.4	1.8	54.3	50.6	89.0	23.2	47.5	11
	Weights	15	15	10	20	15	15	10		

Source: own calculation.

The map below shows the overall ranking of all regions in domain of **Independent, healthy and secure living**.



Source: own preparation.

Capacity and enabling environment for active ageing

The indicators, which were used to construct the index in this domain were: life expectancy at 55, the share of healthy persons aged over 55, mental well-being, social bonds/ties, use of internet and the share of people with tertiary education of people aged 55+.

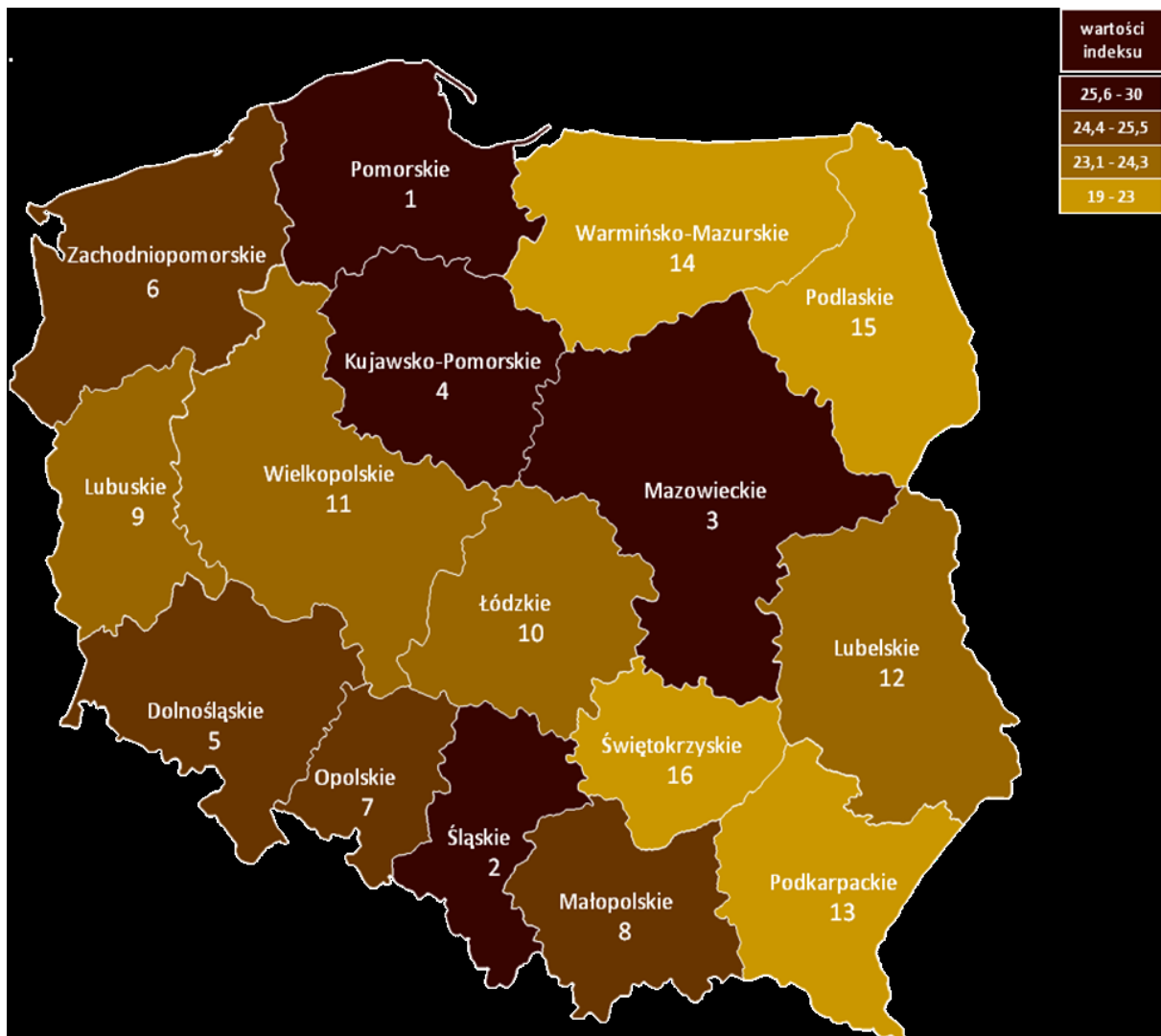
The leaders in this domain are: *Pomorskie*, *Śląskie* and *Mazowieckie* regions. The last in this domain are: *Świętokrzyskie*, *Podlaskie* and *Warmińsko-Mazurskie* regions.

Tabela 4. Capacity and enabling environment for active ageing index

Domain		4.1.Life expectancy of persons in age of 55	4.2 Share of healthy persons in age of 65+	4.3 Mental well-being (55+)	4.4 Use of Internet (55-74)	4.5 Social ties (55+)	4.6 Share of persons with tertiary education in age 55+	Index	Ranking
N o.	Regions	GUS 2011	DS. 2011	DS. 2011	DS. 2011	DS. 2011	GUS 2011	Value	Position
1	Dolnośląskie	24.8	33.8	18.9	33.8	24.6	12.2	25.5	5
2	Kujawsko-pomorskie	24.6	43.0	17.4	28.3	22.8	10.0	25.7	4
3	Lubelskie	24.9	31.8	12.2	32.4	23.0	10.3	23.1	12
4	Lubuskie	24.4	28.7	19.8	38.0	19.8	10.8	24.3	9
5	Łódzkie	24.0	33.8	18.1	30.6	21.5	12.8	24.3	10
6	Małopolskie	25.7	36.6	15.5	25.2	24.4	13.6	24.4	8
7	Mazowieckie	25.5	39.0	16.9	31.5	28.4	18.6	27.1	3
8	Opolskie	25.0	46.9	11.8	24.4	22.1	9.1	24.6	7
9	Podkarpackie	25.8	40.8	12.0	25.3	17.8	8.4	23.0	13
10	Podlaskie	25.7	18.2	12.9	27.6	21.7	10.4	19.8	15
11	Pomorskie	25.2	47.1	20.8	35.8	31.5	13.3	30.0	1
12	Śląskie	24.5	45.9	21.5	31.4	23.8	12.0	27.8	2
13	Świętokrzyskie	25.2	29.5	12.9	17.4	17.0	10.2	19.7	16
14	Warmińsko-mazurskie	24.7	30.4	15.6	22.8	23.3	10.3	22.1	14
15	Wielkopolskie	24.9	29.9	16.5	28.3	24.5	11.4	23.3	11
16	Zachodniopomorskie	24.6	37.0	19.2	29.3	20.6	10.0	24.6	6
Weights		20	20	20	15	15	10		

Source: own preparation.

The map below shows the overall ranking of all regions in this domain.



Source: own preparation.

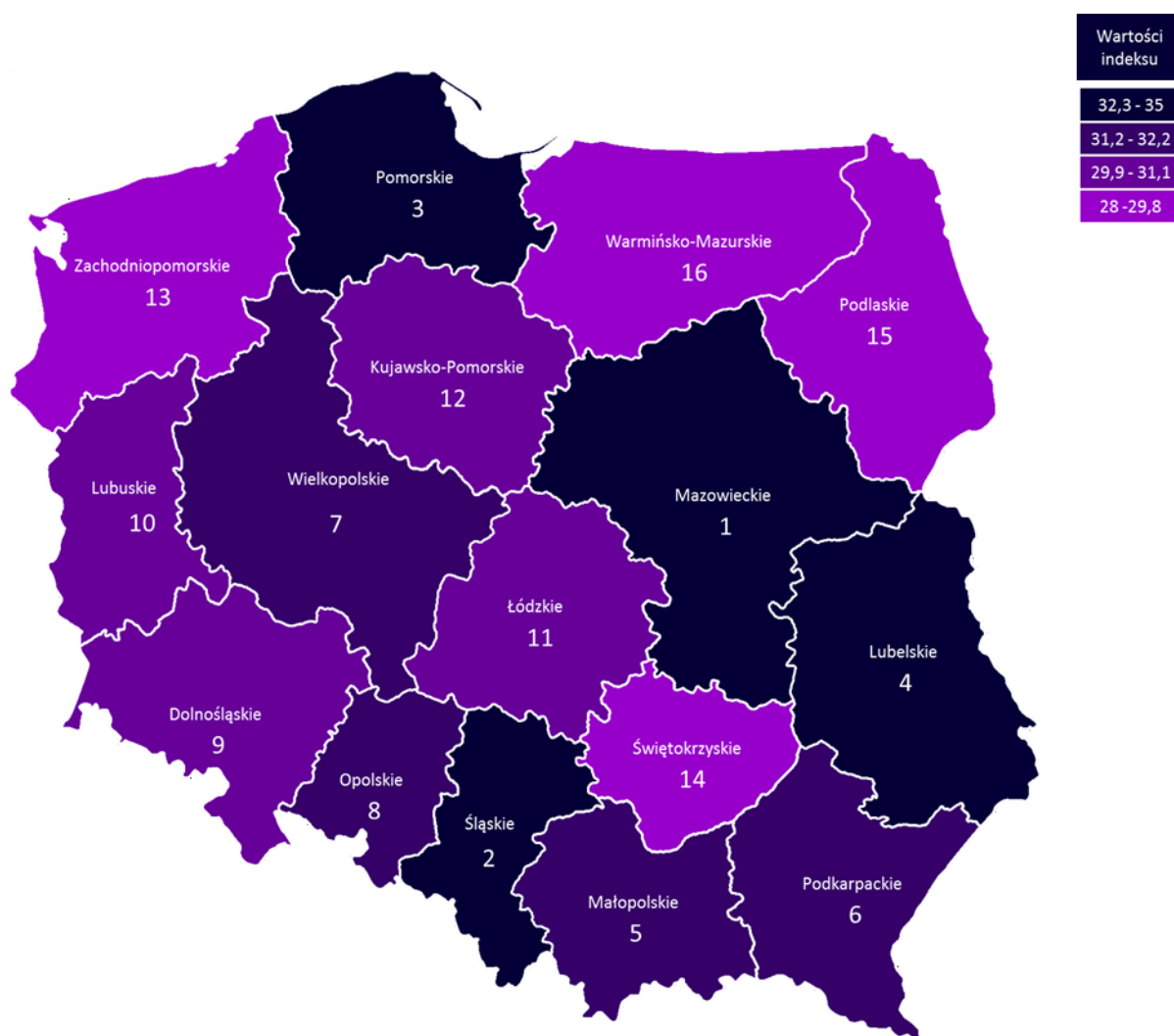
Overall Index of Active Ageing in regional perspective in Poland

As a result of averaging the evaluations from four afore-mentioned domains, the Regional Active Ageing Index for all regions of the country was received. Despite the different weights which were tested to calculate the overall regional AAI, *Mazowieckie* region is always the leader. Below there is a presentation of two various approaches which change ranking depending of what weights will be put for a specific domain.

Tabela 5. Overall regional active ageing index in Poland – Scenario 1 (share: 20%, 20%, 30%, 30%)

		Average and weightes values of indicators of all four domains				Overall regional index of AA	
No.	Regions	1	2	3	4	Values	Position
1	Dolnośląskie	29.7	13.3	49.7	25.5	31.1	9
2	Kujawsko-pomorskie	24.3	11.0	49.3	25.7	29.9	12
3	Lubelskie	38.3	17.3	47.3	23.1	32.4	4
4	Lubuskie	30.3	16.5	48.1	24.3	31.0	10
5	Łódzkie	36.2	11.2	46.8	24.3	30.9	11
6	Małopolskie	32.5	13.9	50.3	24.4	32.0	5
7	Mazowieckie	39.5	13.5	51.7	27.1	34.4	1
8	Opolskie	29.3	12.3	49.9	24.6	31.2	8
9	Podkarpackie	39.8	13.3	46.5	23.0	32.0	6
10	Podlaskie	32.9	11.0	47.5	19.8	29.2	15
11	Pomorskie	28.9	12.1	50.7	30.0	32.5	3
12	Śląskie	27.9	12.0	53.9	27.8	32.7	2
13	Świętokrzyskie	36.7	11.6	44.4	19.7	29.4	14
14	Warmińsko-mazurskie	27.8	9.6	45.6	22.1	28.1	16
15	Wielkopolskie	30.0	13.0	52.8	23.3	31.6	7
16	Zachodniopomorskie	25.2	13.7	47.5	24.6	29.6	13
Weights		20	20	30	30		

Source: own calculation.



Mapa 1. Overall regional index of active ageing in Poland (Scenario 1).

Tabel 6. Overall regional index of active ageing as the original weighting system as in the Active Ageing Index – Scenario 2 - (Zaidi et al., 2013)

Regions		Average and weightes values of indicators of all four domains				Overall regional index of AA	
		1	2	3	4	Value	Ranking
1	Dolnośląskie	29.7	13.3	49.7	25.6	25.1	9
2	Kujawsko-pomorskie	24.3	11.0	49.3	26.7	22.6	15
3	Lubelskie	38.3	17.3	47.3	23.7	28.9	2
4	Lubuskie	30.3	16.5	48.1	24.1	26.0	6
5	Łódzkie	36.2	11.2	46.8	24.7	26.2	5
6	Małopolskie	32.5	13.9	50.3	25.5	26.4	4
7	Mazowieckie	39.5	13.5	51.7	27.5	29.2	1
8	Opolskie	29.3	12.3	49.9	26.4	24.8	12
9	Podkarpackie	39.8	13.3	46.5	24.8	28.2	3
10	Podlaskie	32.9	11.0	47.5	20.5	24.2	13
11	Pomorskie	28.9	12.1	50.7	30.2	25.5	8
12	Śląskie	27.9	12.0	53.9	28.4	25.0	11
13	Świętokrzyskie	36.7	11.6	44.4	21.5	25.6	7
14	Warmińsko-mazurskie	27.8	9.6	45.6	23.2	22.3	16
15	Wielkopolskie	30.0	13.0	52.8	24.0	25.1	10
16	Zachodniopomorskie	25.2	13.7	47.5	25.4	23.5	14
	Weights	35	35	10	20		

Source: own preparation.

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