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**ENTERPRISES' INITIATIVES INTENDED
FOR PERSONS AGED 50 AND OVER
IN THE OPOLE SPECIAL DEMOGRAPHIC ZONE**

**DZIAŁANIA PRZEDSIĘBIORSTW
NA RZECZ OSÓB 50+ W OPOLSKIEJ
SPECJALNEJ STREFIE DEMOGRAFICZNEJ**

DOI: 10.15611/pn.2018.520.07

JEL Classification: J14, J18, L21, M14.

Summary: Adverse demographic changes (ageing of the population, negative population change, depopulation) and their negative effects are currently among the key barriers to development, not only in developed countries. Particularly affected by such challenges, in 2014 the Opole region (admin. Opolskie Voivodeship, Pol. *województwo opolskie*) launched a Special Demographic Zone (SDZ) programme covering the entire administrative area. One of the four thematic packages of the programme is addressed to people aged 50+ and entrepreneurs are among the key programme implementing partners. This article aims to assess the initiatives created for seniors by selected enterprises seated in the SDZ; the assessment is based on conducted surveys.

Keywords: demographic change, ageing of the population, Opole Voivodeship, seniors, special demographic zone, enterprises.

Streszczenie: Niekorzystne zmiany demograficzne (starzenie się społeczeństw, malejący przyrost naturalny, depopulacja) i ich negatywne skutki stanowią współcześnie jedną z barier rozwoju, nie tylko krajów rozwiniętych. W woj. opolskim, jako regionie szczególnie dotkniętym tymi problemami, zainicjowano w 2014 r. program Specjalnej Strefy Demograficznej (SSD), obejmujący całe województwo. Jeden z 4 pakietów tematycznych Programu skierowany jest do osób 50+ a do kluczowych partnerów realizacji całego Programu zaliczono przedsiębiorców. Celem artykułu jest ocena działań podejmowanych na rzecz seniorów przez wybrane przedsiębiorstwa zlokalizowane w SSD, przeprowadzona na podstawie badań ankietowych.

Słowa kluczowe: zmiany demograficzne, starzenie się społeczeństw, województwo opolskie, osoby starsze, specjalna strefa demograficzna, przedsiębiorstwa.

1. Introduction

The rapid ageing of the population has become a global challenge that bears upon not only developed, high income countries. WHO predicts that by 2050 the percentage of the world's population aged 60 and over will have doubled compared to the year 2000 and will have reached 22%. In Europe, which is a fast-ageing continent, this value will reach 34% [WHO 2016, p. 1]. Being aware of the multi-faceted needs of ageing populations and of the urgency to take complex and far-sighted action to offer seniors an adequate quality of life, in 2016 the WHO adopted the Global Strategy and Plan of Action on Ageing and Health; one of its goals is to establish, by 2020, evidence and partnerships necessary to support a Decade of Healthy Ageing from 2020 to 2030 [WHO 2016, p. 9].

The Polish population is generally younger than the populations of most EU countries, but, according to forecasts, this favourable difference is bound to disappear gradually, and around 2050 the percentage of the Polish people aged 65 and over will be clearly higher than the EU average [Wojtyniak, Goryński (eds.) 2016, p. 11]. Meanwhile, given the systemic and individual discrimination of seniors in Poland (ageism) [Dylus et al. (eds.) 2016], our country is not ready for this change. The region in which the ageing of the population and the ensuing negative effects are particularly severe is Opolskie. This is Poland-first region to launch a comprehensive programme aimed to counteract adverse demographic changes and establishing a Special Demographic Zone (SDZ) covering the entire area.

An active partner of public administration in activities geared towards supporting seniors is the business sector, since its role and importance in the modern world is growing. The idea of social responsibility, which, admittedly, has been in the spotlight in recent years, assumes that an organization is responsible for “the impacts of its decisions and activities on society and the environment, through transparent and ethical behaviour that [...] contributes to sustainable development, including health and the welfare of society” [PKN 2012, p. 16].

This article aims to assess the initiatives undertaken for people aged 50+ by selected enterprises from the Opole region. The assessment is set against the backdrop of the demographic trends in the region and the programme pursued with a view to overcoming their negative consequences. The article is based on a critical analysis of the literature on the subject and secondary data, institutional and legal analysis and a survey (sent in liaison with the Marshal's Office of Opolskie Voivodeship to 25 business environment institutions, 45 beneficiaries of the Managing Authority of the Regional Operational Programme for Opolskie Voivodeship 2014–2020 and 17 beneficiaries of the Opole Centre for Economic Development between December 2017 and January 2018).

2. Demographic changes in the Opole region

Demographic challenges linked to a shift in the size and composition of population are particularly visible in the Opole region (OR). Between 2006 and 2016, the Polish population increased by 0.81% (although it had been on the steady decrease since 2011). Over the same period, the population of OR dropped by 4.69%. It was the highest level of depopulation among five Polish regions which faced a similar trend (OR was ranked before Łódzkie, Śląskie, Świętokrzyskie, Lubelskie, and Podlaskie) [<https://bdl.stat.gov.pl/BDL/start>]. The forecasts is that by 2050 the population of OR will have shrunk by even up to 25% (with an average decrease in Poland of 12%) [GUS 2014, pp. 112–114].

On the one hand, it is attributed to a significant drop in the birth rate and a growth in the death rate. OR is ranked third among 11 regions of Poland with a negative population change with the rate at -1.38 in 2016 (the first two are Łódzkie and Świętokrzyskie and the Polish average is -0.15). Since 2006 OR had had the lowest fertility rate in the country (1.201 in 2016 against the national average of 1.357). On the other hand, depopulation is fuelled by unfavourable migration movement (especially out-migration). The internal net migration rate in OR had been negative since 2006 (as in 11 other regions). In 2016 it was -726 people, i.e., OR placed seventh in the country. On the other hand, the net out-migration rate in 2016 was negative only in 5 regions (the Polish average totalled $1,505$), the lowest rate was reported in Śląskie ($-1,128$) and OR (-644) [<https://bdl.stat.gov.pl/BDL/start>]. ESPON studies indicate that OR is among the few European regions with the most adverse impact of migration on the population. According to forecasts, the number of OR inhabitants in 2050 would be 40–60% higher if no migration occurred [ESPON 2010, pp. 20–24].

The demographic problems in OR are made even worse by the growing average life expectancy. In 2016, the figures for Poland were 73.9 years for males and 81.9 years for females. Both in the case of males and females OR ranked fourth in the country: in 2016 life expectancy for males was 74.4 and for females 81.8 (the corresponding rates in Podkarpackie, the winner of the ranking, were 75.4 and 83.0, respectively) [<https://bdl.stat.gov.pl/BDL/start>]. In 2016, the median age (the age limit that half of the population has already reached, and the other half has not reached yet) for the Polish population was 38.6 for males and 41.9 for females. In OR this figure was 40.3 for males (the highest among all the regions) and 43.6 for females (only Łódzkie reported a higher value: 44.4) [GUS 2017, p. 69].

All these phenomena are conducive to the unfavourable changes in the demographic composition of the region. Between 2006 and 2016, the percentage of people in pre-working age (0–17 years) in Poland decreased from 20.1% by 2.2 pp; at the same time, it fell from 18.9% by 3 pp in OR (the largest decrease was reported in Podkarpackie: from 22.3% by 3.9 pp). In 2016 the percentage of people in pre-working age in OR was the lowest in the country and amounted to 15.9%. Between

2006 and 2016, the share of people in post-working age in Poland (65 and over for males, 60 and over for females) increased from 15.7% by 4.5 pp; it also surged from 16.1% by 4.8 pp in OR (the largest increase was reported in Zachodniopomorskie: from 14.3% by 6.1 pp). In 2016 the percentage of post-working age people in OR was 20.9%, which placed the region fifth in the country (after Łódzkie with the highest figure of 22.5%). The old-age dependency ratio (population in non-productive or pre-working and post-working age per 100 persons in working age) in Poland increased from 55.7 in 2006 to 61.7 in 2016 and from 53.7 to 58.2 in OR. In the studied period, the highest increase of this ratio was reported in Dolnośląskie (by 9.4 pp. to the level of 61.3). The top ratio in 2016 was seen in Łódzkie: 64.7 [<https://bdl.stat.gov.pl/BDL/start>].

3. The Opolskie for the Family programme

Depopulation of OR threatens the processes of socio-economic development as well as posing a risk to public finance. Prevention and counteraction of depopulation processes was considered a horizontal development challenge in the Opolskie Voivodeship Development Strategy until 2020 adopted in 2012 [Samorząd Województwa Opolskiego 2012, pp. 81, 82]. One of the tools in the strategy implementation is the Opolskie for the Family: a Special Demographic Zone Programme for Opolskie Voivodeship until 2020, adopted by the Resolution of the Executive Board of Opolskie Voivodeship on 16 September 2014 [Urząd Marszałkowski Województwa Opolskiego 2014]. It is a pilot programme embracing many innovative tools at the regional level. They are expected to counteract and, on the other hand, help adapt to the adverse demographic shift. The programme aspires to strengthen and tap the demographic potential of OR, this being made possible through the stimulation of the labour market and improvement of living standards in the region. The programme was designed by experts and members of the public: the process involved debates, sectoral consultation, conferences, and expert panels.

The programme is made up of four thematic packages (or priority impact areas) and three support initiatives (complementing the packages and having an indirect influence on each of them by addressing the needs of families and seniors directly) – Figure 1. Each package goes with specific objectives. They are achieved by actions (directions of intervention) to be pursued through the implemented types of projects/projects (implementation tools).

The last of the packages, Golden Autumn, is intended for people aged 50 and over.¹ It promotes the development of favourable living conditions for elderly people and helps tap their potential for the regional development. The package fosters the professional, movement, cultural, and educational activation of seniors and strengthens their motivation for self-development, which should not only reverse the impact of unfavourable demographic processes but also change the perception

¹ In demographic terms, from the age of 50 individuals enter the period termed “the foreground of old age” [Iwański 2017, p. 116].

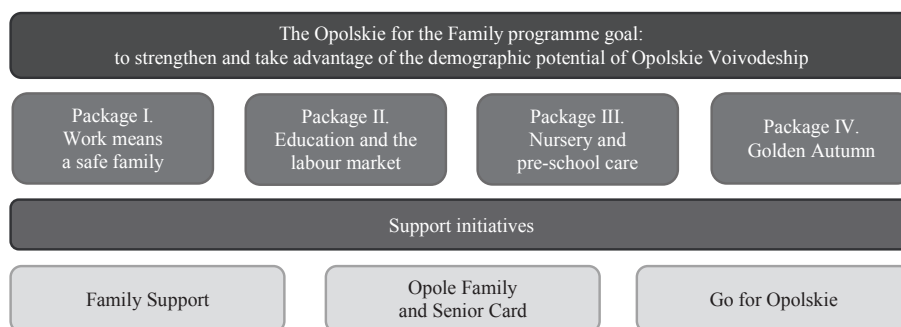


Figure 1. The Opolskie for the Family programme packages

Source: [Urząd Marszałkowski Województwa Opolskiego 2014, p. 38].

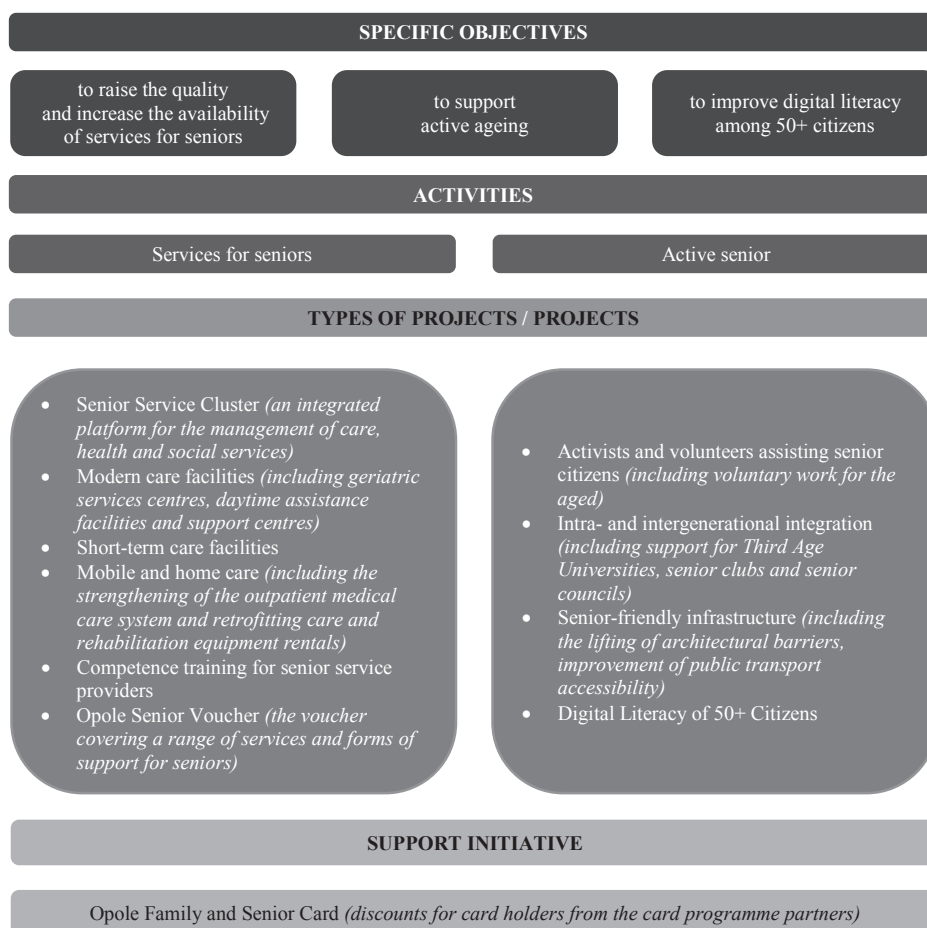


Figure 2. Structure of Package IV Golden Autumn

Source: own study based on [Urząd Marszałkowski Województwa Opolskiego 2014, pp. 67–71, 75].

of elderly people and promote intergenerational social integration. The detailed structure of Package IV is shown in Figure 2.

The programme is clear that its multi-faceted and comprehensive activities must be undertaken in close cooperation and with the commitment of various stakeholders, including entrepreneurs. Entrepreneurs are named the key partners of all four packages [Urząd Marszałkowski Województwa Opolskiego 2014, pp. 11, 68].

4. Enterprises' initiatives for seniors: Research results

The research on initiatives undertaken, both individually and through partnerships, by enterprises operating in the SDZ to improve the quality and availability of services for people aged 50 and over and to support their activity and raise their competence was carried out in liaison with the Marshal's Office of Opolskie Voivodeship. An anonymous online survey underpinning the research consisted of maximum 32 closed and one open (optional) question to allow the elaboration on the enterprise's own practice. The survey was sent to 25 business environment institutions, 45 beneficiaries of the Managing Authority of the Regional Operational Programme for Opolskie Voivodeship 2014–2020 (Measures 7.4, 8.1 and 8.2) and 17 beneficiaries of the Intermediate Body (the Opole Centre for Economic Development or OCED). The research was conducted between December 2017 and January 2018.

The survey was completed by 12 enterprises, including eight micro (0-9 employees) and four small enterprises (10–49 employees). Ten of them were private businesses with the Polish capital (100%) headquartered in OR (five outside the city of Opole). They primarily represented the trade and service sector, care services (three indications), as well as health protection, and rehabilitation and medical sector (two each). The surveyed enterprises were mainly operating in OR (11) and in the adjacent regions (two), one in entire Poland and one abroad. Most of them have been on the market for less than 15 years (eight indications). 50+ employees in the surveyed companies accounted for less than 10% of the staff (nine cases); only in three companies there were more than 10% of such workforce.

From among 12 surveyed businesses, majority declared some initiatives set up for the improvement of accessibility of products and services to persons aged 50 years and over and for the activation of elderly people (nine indications each) as well as the enhancement of the quality of products and services for seniors (eight). Five businesses confirmed action taken for the promotion of digital literacy of 50+ persons. Three enterprises admitted that they took no action intended for seniors in any of the named areas (they failed to complete the remainder of the survey). From the nine businesses further surveyed, majority intends to take, in the nearest future (1-2 years), new action addressing the improvement of accessibility of products and services to elderly people (seven indications), the improvement of the quality of products and services for seniors (six), less frequently the activation of persons aged 50 years and over (four) or the development of their digital literacy (three).

With regard to the improvement of accessibility of products and services for elderly people, the studied businesses entered into cooperation with various entities with a view to resolving different seniors' problems and marketed new technologies/products/services intended for persons aged 50 years and over (eight indications each); less frequently, they opted for the enhancement of the quality of services for seniors (four cases) – Figure 3.

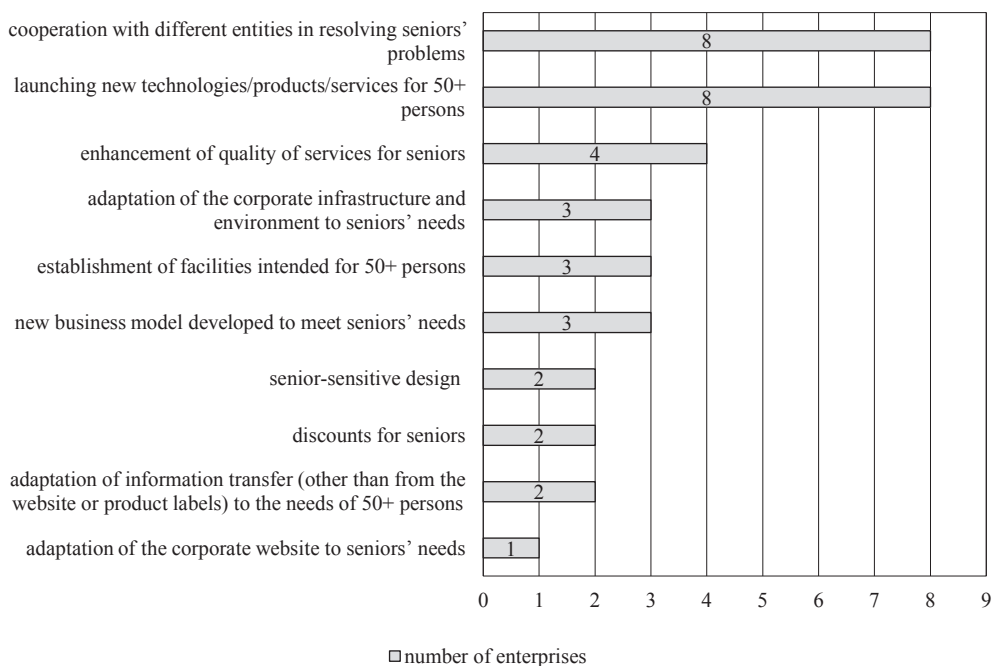


Figure 3. Enterprises' initiatives for the improvement of accessibility of products and services to seniors

Source: own study based on conducted research.

When it comes to the activation of elderly people, the surveyed businesses most often promoted a healthy lifestyle of people aged 50 and over (six indications) and supported the creation and operation of senior social integration facilities (five) – Figure 4.

As regards the improvement of the quality of products and services for elderly people, the surveyed enterprises upgraded existing services to cover the needs of 50+ persons (seven) and enhanced the recipes/composition of existing products to meet seniors' needs more effectively (two). Speaking of the development of digital literacy among elderly people, the surveyed businesses offered training sessions in computer, software, and application use for persons aged 50 and over (four indications) as well as courses and training programmes covering the use of mobile phones, tablets and

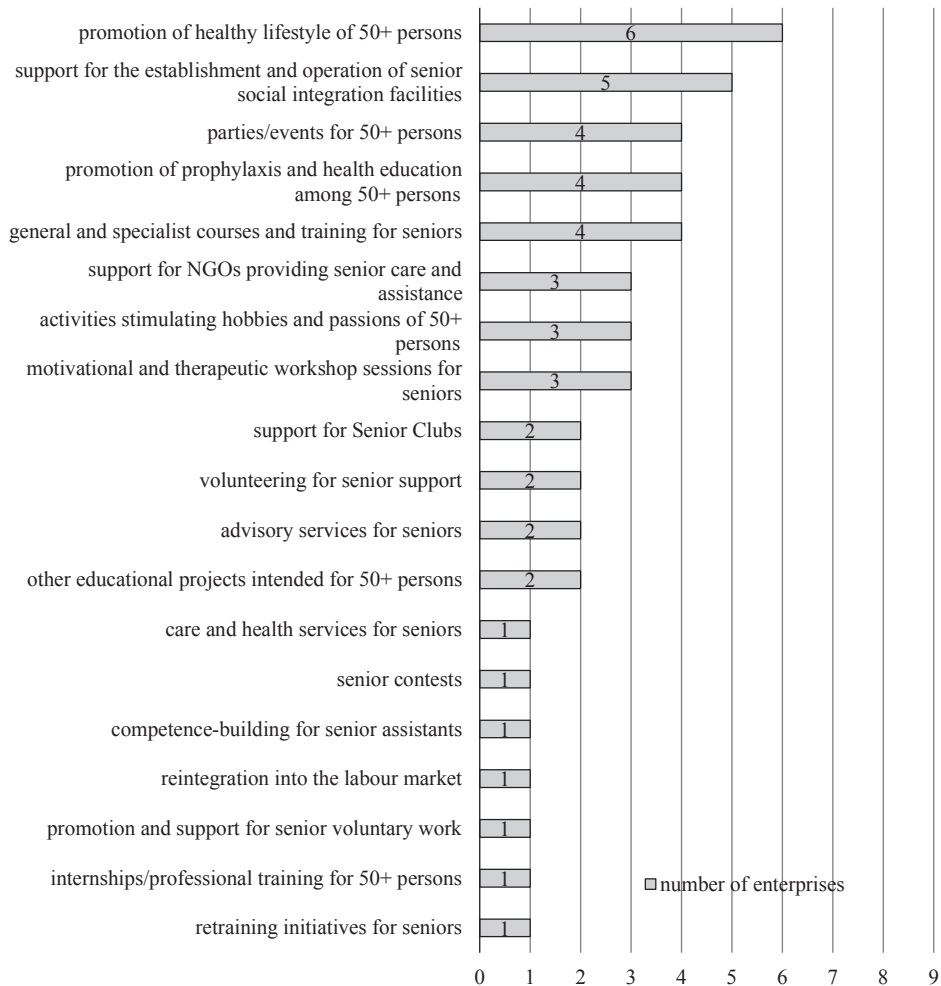


Figure 4. Enterprises' initiatives for the activation of seniors

Source: own study based on conducted research.

other digital media (three); on top of that, several businesses opened an Internet café and produced a thematic publication (one indication each).

The initiatives listed above were primarily pursued by the business independently (seven indications); in four cases, it was on a public-private partnership basis and public-private partnership and private-private partnership (two indications each). Some of the initiatives intended for 50+ persons that they surveyed businesses boasted in particular are, for example, the development of social innovation, more than 50% of employed staff aged 50 and over, or the establishment of cross-generational or cross-age working teams. Still, only one of nine surveyed businesses were rewarded

for their pro-senior initiatives (they received a development subsidy). None of the surveyed enterprises was able to identify a company from the Opole region that could be named leader or role model of 50+ initiatives.

The same number of businesses confirmed and denied having been motivated or driven by the programme in their pro-senior activity (four indications each); one enterprise was not able to answer this question. From among nine studied businesses only one belonged to the Regional Opole Senior Cluster², and three were planning to join the initiative in the future. Services falling under the Opole Family and Senior Card³ were rendered by four of the surveyed businesses, and three enterprises rendered the same as part of the Opole Senior Card⁴.

Finally, it is worth noting that none of the nine surveyed enterprises declared that they were implementing the idea of social responsibility: three of them admitted that they were not pursuing it, two admitted that they were rather not pursuing it, and four that they had not heard about this concept. This seems to confirm a commonly held, but also broadly studied, view MSMEs often implement the concept of social responsibility unconsciously.

5. Conclusions

The Opole region suffers from adverse demographic changes: dwindling birth rate, growing life expectancy, growing median age, and mass out-migration. Those overlapping trends lead not only to unfavourable changes to the composition of the population (expressed in the growing old-age dependency ratio) but also accelerate the region's depopulation which is far beyond the EU's and general Polish average.

An attempt to counteract but, at the same time, adapt to these challenges is the launch of the Opolskie for the Family programme which, on a pilot basis, established the Special Demographic Zone in the entire region. The programme proposes multiple innovative solutions in the area of labour market stimulation and the enhancement of the living standard in the region, including for seniors. One of the four programme's packages is intended to incentivize seniors to take the professional, movement, cultural, and educational effort. The key programme partners are businesses because of the multi-dimensionality of the demographic problems.

The research done among some selected SDZ businesses revealed that majority of them undertook initiatives for seniors, both addressing the improvement of quality and accessibility of products and services for elderly people and motivating them to increase their digital literacy. Even though some of the surveyed businesses did not pursue the programme's recommendations consciously, they partook in the

² The cluster gathers six partners-founders.

³ The card boasts 190 partners [*Opolska Karta...* 2018].

⁴ The card has been issued since January 2017 and is available to Opole residents aged 65 and more; today, it has 145 partners offering an array of discounts [*Od 1 stycznia...* 2016].

programmed initiatives (e.g. by offering services under the Opole Family and Senior Card). Studies demonstrate that enterprises get involved in initiatives for 50+ persons somehow „intuitively” and just start responding to the needs of ageing market. In doing that, they seldom realise that such action falls within a broader programme of age management that requires a comprehensive and strategic approach – also within the organisation. What is more, they seem not to fully come to terms with the fact that efficient age management, just like any other global issues, calls for intersectoral partnerships.

Enterprises’ initiatives for seniors demonstrate that the process of ageing of the population is not only a challenge but also a development opportunity. An example of this is the American engineer Barbara Beskind. Not only was she employed by IDEO from the Silicon Valley at the age of 89 but also started to design solutions for seniors (from 2013), since a person of her age can understand the needs of their peers better than anyone else. This and other telling examples (e.g. Wirginia Szmyt, well known Polish DJ Wika) help challenge existing stereotypes on old age.

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