

ASPA



Activating Senior Potential in Ageing Europe

D.4.2. National report: POLAND

Report on organisational case studies



European Commission



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PART ONE: NATIONAL SUMMARY REPORT POLAND

ASPA WP 4 POLAND – Report from the fieldwork of case studies

April 2011

1. Conducted case studies

Table below presents the final set of conducted case studies. Totally, Polish team has investigated 14 companies.

	Construction, manufacturing, production	Services, trade	Public services
<250	1) KAMPOL (+ trade, services); 2) Filter Service 3) Radio-technical Work Cooperative 4) TopRonic (+trade) 5) Production (anonymous)	6) CTO 7) Social Cooperative "50+" 8) Building-Housing Cooperative OAZA	9) WORD (public)
250-500	10) Power plant (anonymous)		
>500		11) High Tech (anonymous); 12) Bank (anonymous) 13) EMITEL	14) Vattenfall Heat Poland S.A.

a) Longitudinal companies:

1. Bank (anonymous)
2. High Tech (anonymous)
3. CTO
4. Filter Service
5. Production (anonymous)

b) Winners of the 1st and 2nd Edition of the "Profit 50+: Fair Employer towards Older Worker" - Competition of The Academy for the Development of Philanthropy in Poland:

6. Kampol
7. WORD
8. EMITEL
9. Social Cooperative "50+"

c) "New" companies:

10. Vattenfall
11. Power plant (anonymous)
12. Radio-technical Work Cooperative
13. Building-Housing Cooperative OAZA
14. TopRonic

We have collected 9 "good examples", among them one report (no 7 – Cooperatives) consists of investigation in 3 companies: small cooperatives. We decided to present all these interesting cases as a one general example of "cooperative" form of employment. Two case studies are treated as anonymous. Among them there is one "bad example", a longitudinal case (BANK).

We have also written up anonymous contact reports (not included in this report). These are specific cases. One of them cannot be considered as completed case study, as the company has not provided us with sufficient information. Even though, it was not a good example. The second company is a longitudinal case from Eurofound, which turned out to be incorrect (the company has never had any special age management and they do not know how it happened that they appeared in Eurofound reports).

The final list of case studies is following:

1. CTO
2. WORD
3. KAMPOL
4. EMITEL
5. Vattenfall Heat Poland S.A.
6. Filter Service
7. Cooperatives:
 - a) Spółdzielnia Socjalna "50+";
 - b) Spółdzielnia Budowlano-Mieszkaniowa „OAZA”;
 - c) Radiotechniczna Spółdzielnia Pracy)
8. POWER PLANT [Anonymous]
9. TopRonic
10. Bank [Anonymous]

Additionally, two contact reports (not included in this report):

11. Hi-Tech Company
12. Production

2. Unsuccessful case studies

The Polish research team from the beginning of this work in this WP4 has contacted several companies which could be potential case studies. The contacts took a lot of time, efforts, calls, mails and reminds. Some of them categorically refused cooperation from the beginning, some have not given the final answer, even though we put much effort to convince them. In some cases the contact with companies was lost. Altogether eight companies (good employers and ASPA cases which we identified under a certain idea sent earlier) declined participation in the study.

In addition, we did not manage to establish the final meetings/contacts with a further eleven companies.

3. Difficulties during the realization of the case studies

Let us describe few examples of the history of contacts, what will maybe enclose you the reality of doing such a research on this particular topic in a country like Poland:

- a) Case studies from Eurofound, where 2 of the 4 are significantly suspicious. As regards one of them we managed to talk to a high-position person who openly admitted that they do not exactly know how did it happened, that they were described as a good practice in age management (there is no person who knows who contacted the researchers), as they have never had any special practices nor policy towards 50+.
- b) A winner of the Profit 50+” scheme: after 2 months of many mails, letters, phones (even using private contacts) we still do not succeed to even talk to someone responsible and interest in discussion; a very significant fact is that they have won the contest even though they employ only 4% of workers 50+.
- c) A longitudinal case study from ActiveAge: a lot of mails, phones in different months, few phone talks (period between autumn 2009 –summer 2010), after which the Human Director finally refused, saying that maybe next year they will have something to say
- d) in the first edition of “Profit 50+” only 7 or 8 companies applied (and from 3 winners 1 has actually no policy but only plans for age management in the future).

Most of the companies did not even respond for emails; contacts with higher-position people by telephone were often impossible (an usual answer of the secretary: “there is no time for such a discussion”). A difficult period of economic slowdown was surely not without importance in attempts of finding free time for interview for the company representatives. The opportunity of being described as a good case study was not recognized as an opportunity for promotion of the company. Majority of contacted companies (even some investigated ones) had no idea about age management or any special practices towards older workers. Age management and policies towards older workers are unfamiliar to Polish employers. Contacted companies were afraid of being described in adverse light. This is probably general problem with the lack of trust in Poland. During the interviews there was a risk of imposing artificial categories, what might result in artifacts. If a company really had no special age-related policy (most of cases), respondents often tried to generalize individual cases of

older workers and treat it as a “policy”. Nevertheless, we put much attention to avoid such misunderstanding and not to produce false results and false case studies.

Concluding, the most significant difficulties during realization of the case studies were: no agreement for interviews (or no contact with the company) and lack of age management in the company.

PART TWO: CASE STUDY SUMMARY TABLE

ASPA WP4 Completed Case Study Summary Table

Nr.	Name of organisation	Size of establishment	% of men, women and workers aged 50+	Motivation of the firm for age management	Nature of social dialogue	Target group in original and current initiative	Age profile in original and current initiative	Retention or reduction of original initiative	Age management approaches* (see bottom of table for codes)
1	CTO Centrum Techniki Okrętowej S.A. (Ship Design and Research Centre)	173	37% women; 40% older workers	Project Mayday carried out under the EQUAL Community Initiative between 2004 and 2008; Mentoring is a relatively inexpensive measure allowing for a transfer of competencies and knowledge; High percentage of workers 50+; Year of introduction: 2004 Longitudinal;	There is 1 trade union. The relations have been assessed as positive.	Original and current initiative: - experienced workers (mentors) - new workers	workers of all ages	Retention	2 3 4 5 6 8 10
2	WORD	80	% women – minority 50% older workers	specificity of the branch – experience and years knowledge are highly valuable; high share of older workers - since the beginning the company is developing and increasing employment without mass dismissals; very positive impact of	No trade unions or council.	Current initiative: - all workers	workers of all ages	---	1 3 4 5 6 7 8 9

				trainings and initiatives for integration on the workers attitudes and motivations, as well as on the general work atmosphere					
3	KAMPOL	100	About 60% women; 50% older workers	<p>Policy of social responsibility; personal approach to work and workers of the owners;</p> <p>high share of older workers (specificity of the branch - usually older workers are the best specialists of bakery and confectionery branches; character of local labour market);</p> <p>increase of loyalty and motivation of employees;</p> <p>high risk jobs;</p>	No trade unions or council. Informal relations, family atmosphere;	Current initiative: - all workers - bakers and confectioners - sellers and shop-assistants	workers of all ages	---	1 3 4 5 6 7 9
4	EMITEL	933	15% women; 33% older workers	<p>Development and maintenance of specialist knowledge, experience and competencies within the organization is essential for the success;</p> <p>Specialists are rarely met at the external labour market;</p> <p>Relatively small turnover rate (8%) and high share of older workers (56% of employees 40+);</p> <p>Decrease of the costs related to training and advisory services for employees by</p>	There are trade unions in the company. The relationships between the management and trade unions was assessed very positively by the interviewees.	Current initiative: - qualified workers	workers of all ages	---	1 3 4 5 7 8 Other: personnel planning (age and competence structure analyses)

				internal trainings and knowledge transfer. Year of introduction: about 2008					
5	Vattenfall Heat Poland S.A.	1114	15% women; 43 % older workers;	<p>In the following seven to eight years, almost 50% of the employees will be eligible for retirement. In the near future, Vattenfall will have to face the problems of numerous retirements and a shrinking labour market;</p> <p>The management of the company understands that the experience of senior employees is a resource of strategic meaning that is crucial to future success</p> <p>Longitudinal case: Active Age</p>	Trade unions exist in each unit of Vattenfall	Current initiative: - all workers	workers of all ages	---	2 3 4 6 7 8 10 Other: job rotation programs; age-diverse team development
6	Filter Service	210	41% is 46 years old or more	<p>Filter Service is Supported Employment Enterprise, aimed at employment of disabled people and increasing of the activity among people with disabilities. This surely supports development of age management measures.</p> <p>Longitudinal case: EUROFUND project</p>	There are no trade unions	Original and current initiative: - all workers	workers of all ages	Retention	3 6 7 8

7	Cooperatives: a) Spółdzielnia Socjalna "50+"; b) Spółdzielnia Budowlano-Mieszkaniowa „OAZA”; c) Radiotechniczna Spółdzielnia Pracy)	7; 18; 18	Older workers: 100% 50+; 45% retired; 60% retired;	<p>Work cooperatives are aimed at income, nevertheless this form of organization is conducive to development of work conditions different than in normal profit companies, i.e. a good and friendly work atmosphere in which each worker is an important element of the whole team;</p> <p>The social cooperative allows to use economic activity to achieve social goals, primarily professional and social integration of people in difficult situation.</p>	<p>There are no trade unions</p> <p>Each member has the right to participate in the management of the cooperative.</p>	Current initiative: - all workers	workers of all ages	---	1 2 3 6 7 Other: work atmosphere
8	ANONYMOUS (Power Plant)	470	48% of older workers	High share of tenure workers	There are no trade unions	Current initiative: - all workers	workers of all ages	---	3 7 Other: remuneration, retirement benefit
9	TopRonic	86	87% women; 60% of older workers	Topronic bases on the work of mid-age and older women mostly due to their communicational skills, reliability and practical experience. They also are able to gain the trust of clients and better explain the features of products which Topronic offers.	There are trade unions	Current initiative: - all workers	workers of all ages	---	1 3 6
10	ANONYMOUS (Bank)	2000	2% of older workers	Not good practices in age management	There are few small trade unions	---	---	---	---

				Longitudinal case: Active Age					
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* Age management approaches – please enter relevant categories (see below) which match the dimensions listed in WP4 guidelines:

1. Job recruitment
2. Awareness raising, changing attitudes and diversity
3. Training, lifelong learning and knowledge transfer
4. Career development and mobility management
5. remuneration, i.e. consideration of bonus and salary systems
6. Flexible working practices (including working-time arrangements over the life-course and reconciliation of work and family life/care
7. Health protection and promotion and workplace design
8. Redeployment and retention
9. Employment exit and the transition to retirement
10. Comprehensive approaches.

PART THREE: CASE STUDIES IN ORGANISATIONS

CASE 1: Company: Centrum Techniki Okrętowej S.A. (Ship Design and Research Centre)
Longitudinal case: EUROFUND project

Interviewees: 1 (HR Department)

Executive summary

Ship Design and Research Centre (CTO) is a research and development centre for Polish the shipbuilding and ship repairing industry. The mission of CTO is to initiate and to support the shipbuilding industry with providing technological research, designing and development activities.

Almost 40% of its employees are aged 50+. It has developed a well thought out, long term personnel policy that incorporates age management strategies. CTO attempts to utilize the potential of older and experienced workers, primarily through a system of mentoring and teaching their younger colleagues. Additionally, CTO puts a lot of attention on the continuation of cooperation, that can occur in various forms, with workers who have formally retired, as well as planning career development paths for employees. Between 2004 and 2008, CTO was involved in the Mayday Project "Model of Active Support of Employees' and Companies' Development in the face of Structural Changes in Economy", carried out under the EQUAL Community Initiative. It aimed at increasing the adaptability of workers aged 50+. The project helped in developing a system of mentoring, increasing general knowledge about age management and contributing to the implementation of other practical measures in the company.

CTO was presented as a good example of age management (as one of four companies in Poland) in the project of the European Foundation for the Improvement of Living and Working Conditions in 2007.

1. Organisational background

Metadata:

Criteria	Parameter value
Size (employees)	– Medium (117)
Sector	– Services – Private
Work council	– No
Business volume	– <i>no information</i>

Centrum Techniki Okrętowej S.A. (CTO - Ship Design and Research Centre) has a strong position as a research and development centre acting for the Polish shipbuilding and ship repairing industry. The essential mission of CTO is to initiate and to support the shipbuilding industry with providing) technological research, designing and development activities.

It was established in 1971 as a state owned company, created by joining the Central Design-Research Office of Shipbuilding Industry and the Central Ship Design Office No. 2 as a result of the disposition of Ministry of Heavy Industry. In this case the CTO became the successor of an earlier established design-construction and research-development divisions that used to act for the benefit of the shipbuilding and repairing industry. The change in political and economic systems brought difficulties to the CTO at the beginning of 1990s. The sudden decrease in orders from the shipbuilding industry resulted in reductions in employment. CTO had to adapt to the new free market economy to compete with foreign institutions and enterprises.

In 1990, CTO was transformed into a multidivisional state-owned company. In 2002, CTO has obtained the status of a research and development unit. In 2004, it was transformed into a joint stock company owned by the Ministry of Treasury.

The research goals are determined by the needs of the shipbuilding industry and the national economy. The findings are used not only in shipbuilding, but also in other types of shipbuilding industries, public utilities and land-industries. CTO also exports its knowledge and advanced technologies. Research and development activities are performed in cooperation with numerous domestic companies, such as shipbuilding and ship repair yards, suppliers of shipbuilding equipment and design offices, as well as technical universities and other research centres. CTO also supports the education and development of the sciences by facilitating access to research laboratories for students and research staff of technical universities.

As of December 31, 2009, CTO employed 173 people, of which 40 were physical workers and 133 were non-physical workers. Sixty-three percent of employees were men, while 37% were women.

Table1. Educational structure of employment

Level of education	% of total	
	2008	2009
Higher	54,5	56,1
Secondary - Vocational or Postsecondary	23,4	22,0
Secondary - Comprehensive School	7,2	6,9
Primary (including Vocational)	14,9	15,0
Total	100%	100%

More than a half of the staff has a higher education. Almost one third of the staff has a secondary education.

Almost 40% of the workforce is 50 years old or more. Comparing 2008 and 2009, the share of older workers increased by 3%. CTO currently employs nine workers who are formally retired.

Table 2. Age structure of employment

Age	% of total		Change (2009 : 2008)
	2008	2009	
30 and less	12,6	12,1	96,0
31 to 40	20,4	19,1	93,6
41 to 50	31,1	29,5	94,9
51 to 60	28,1	28,3	100,7
61 and more	7,8	11,0	141,0
Total	100%	100%	

In 2009, three workers retired and left the company; 15 were dismissed and six new workers were hired.

There is 1 trade union.

2. Age management approach

The company has a well-developed long-term age management approach, which includes:

- Systems of mentoring - older workers are mentors and teachers for younger workers, apprentices and trainees.
- Continuation of the cooperation in various forms with workers who have formally retired (employment contract, civil-law contracts, engagement in the role of expert or consultant, conducting professional supervision).
- CTO implemented a system of competence tests and evaluations for flexible career planning and to maintain the company's competence resources, as well as to effectively use the knowledge and experience of older workers.
- Increasingly important became activities carried out by the company in the area of health protection - a package of medical and preventive health care benefits paid by the employer.
- Planning the size and structure of the workforce (including retirement decisions, training followers, the early association of mentors and students).
- Identifying areas of knowledge that are associated with older workers in order to preserve areas of competence in the company;
- Identifying training needs and planning training activities in the context of the redeployment of employees and their competencies.
- Planning career development paths for employees (including an assessment of an employee's competencies).
- Anti-age-discrimination policy.
- Bonuses for loyal and long term employees within the company.

3. The original measures

CTO was presented as a good example of age management (as one of four companies in Poland) in the project of the European Foundation for the Improvement of Living and Working Conditions in 2007. The short description emphasized two especially important measures: employment of retired workers as in-house experts and implementation of the function of mentor.

CTO maintained regular contacts with a significant number of its previous, experienced and high-qualified constructors of various specialisations, by commissioning them work (the company employed about 10 retired employees each year). Older workers (also the retired ones) were engaged in the role of in-house experts, as well as mentors for younger engineers. Retired workers were employed on the basis of temporary contract and with flexible working time.

4. Development of the initial measures and current practice

The shipbuilding industry has been experiencing a major crisis for many years in Poland. Two spectacular examples are the Gdansk Shipyard and Gdynia Shipyard that in the past had employed several thousand employees. Now the Gdynia Shipyard has been liquidated and the Gdansk Shipyard faces some serious financial problems. Such unstable situations contribute to problems for employees in this sector. Young people find it easier to adapt to changes. Older workers are not always able to adjust to changing conditions and employers are not always aware of the need of development of newer skills and lifelong learning. Workers aged 50+ are more likely to lose their jobs, particularly in cases of employment reductions or a situation of introducing new technologies to the company.

This situation was the reason for the development of Project Mayday - "Model of Active Support of Employees' and Companies' Development in the face of Structural Changes in Economy", carried out under the EQUAL Community Initiative between 2004 and 2008¹. The project aimed to increase the adaptability of workers over 50 years old employed in the shipbuilding sector enterprises, who are discriminated against in the labour market due to their age. The idea was to build an innovative and sustainable system of support, allowing for the adaptation to new skill requirements of employers. The central measures then became age management, lifelong learning and mentoring.

The MAYDAY project was primarily aimed at breaking down generational and awareness barriers and creates a natural system of knowledge transfer. It resulted that in CTO, particularly the development of tools and schemes for mentoring was implemented. However, soft results of the project were important as well, namely:

- An increased awareness between employers and employees in the use of various sources of information for independent problem-solving and development of skills of workers,
- An increased awareness of employers and trade unions in the efficiency of joint problem-solving in the workplace and in the sector,

¹www.equal-mayday.org.pl

- The promotion of lifelong learning,
- An increased awareness of the possibility of combining the work experience of current staff and young employers,
- An increased awareness of company's responsibility for solving the problems of workers 50+,
- increased self-esteem among employees 50+ and belief in their own powers,
- bridging the generations of experienced and younger employees through the implementation of mentoring.

Today at CTO older workers are high-valued specialists, possessing broad work and life experience, as well as tacit knowledge. Within the company's business field, the experience of employees is a huge asset. Older workers in the company have not only tremendous knowledge and experience, but also, so-called, professional intuition, which is invaluable in many areas such as design or research of high innovative potential. Such competences are obtained by employees only after several years of work and their importance for the company is invaluable, says the respondent. Ageing and the risk of retirement of the best professionals is actually a significant problem for this particular company, hence the company has taken steps to intensify and extend the operation of mentoring.

"The company," – said the president of CTO – "is trying to combine years-experience of older designers with a young "blood"- young people who are fully acquainted with new technologies, but unfortunately have no professional experience." He believes that the combination of many years of professional experience with knowledge about modern techniques (especially computer technology) will ensure innovation and stabilization within the company.

The existed ways of engagement older workers are assessed positively by both sides. For the company the prime advantages are: the use of knowledge and experience of older people; sharing knowledge with younger workers; faster training and introduction of young workers into the organization; training of successors; and maintenance and transfer of the company's specific knowledge and skills. Whereas older workers benefit from: the feeling of being needed; improvement of material status and learning new skills by working with young workers (e.g. using of new technologies).

Public policy has had no impact on actions and human policy management in CTO (says the respondent.) The reason for this specific approach lies in the attitude and awareness of company management, which not only sees the need for employment of older persons, but also applies it in practice.

One of practical reasons for implementing mentoring on a larger scale was the cost. Mentoring is a relatively inexpensive measure allowing for a transfer of competencies and knowledge. For the company, the costs of large-scale trainings could be too high. An internal system of mentoring provides a much cheaper and better way of teaching and developing younger workers and planning the structure of competencies.

5. Concluding reflections from the researcher

Ship Design and Research Centre is a company employing a relatively high percentage of workers 50+ (almost 40%) and consciously developing appropriate age management strategies as part of their long-term personnel policy. CTO attempts to utilize the potential of older and experienced workers, primarily through mentoring and teaching younger colleagues. The company also cares about training for older workers, improving their skills, motivations and work attitude. Such an approach has been developed by the company as a response to the unstable situation in the shipbuilding sector. Long-term planning allows stabilising the employment situation and developing a beneficial competence structure.

Worth mentioning is also the fact that CTO has been continuously developing its age management strategy (mainly mentoring and employment of retired workers) for many years. It has put much interest in planning of personnel management policies.

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CASE 2: WORD

Executive summary

Voivodeship Centre of Road Traffic – Regional Centre of Road Traffic Safety in Olsztyn (*Wojewódzki Ośrodek Ruchu Drogowego w Olsztynie <<WORD>> - Regionalne Centrum Bezpieczeństwa Ruchu Drogowego w Olsztynie*) is a company belonging to the public sector, subordinated to Voivodeship Marshal. WORD runs training and examination activity and additional activities referring to road traffic safety.

The company is strongly based on older workers (50+), who constitute almost 50% of the personnel. It provide a broad range of practices supporting older workers, the carrier development and work quality.

In 2009 WORD for its activity for older workers was awarded (as one of 3 laureates) in the national contest “Benefit 50+”, organized by The Academy for the Development of Philanthropy in Poland.

1. Organisational background

Voivodeship Centre of Road Traffic in Olsztyn was established in 1998 as an public entity subordinated to the Voivode. After the administrative reform superintendence was transferred to Voivodeship Marshal. The basic goal of the Centre is organisation of state examinations checking qualifications of persons attempting to receive driving licence and possessing the driving licence. WORD runs also the vehicle control station, trainings for driving instructors and examiners, psychological workshop (with possibility of conducting psychological examinations). A very important field is activity in road traffic safety. The company has organised or participated in numerous events, projects, conferences and workshops related to the topic, aiming to improve the road traffic safety in the region. In 2003 the name of the company was extended by an additional part: WORD - Regional Centre of Road Traffic Safety.

Since the beginning the position of director has been held by Andrzej Szóstek.

The company presently counts 82 workers:

Age group	Number	%	49%
Less then 30 years	6	7%	
30-39	19	23%	
41-49	17	21%	
50-59	23	28%	
60-64	9	11%	
More than 65 years	8	10%	
Total	82		

WORD, despite the fact that is formally a public company under protection of Voivodeship Marshal, has almost a full autonomy in activity and functions on the basis similar to a private company (however restricted by some additional legal regulations). Voivodeship Marshal decides only about the position of director and establishes the statute.

2. Age management approach

Almost 50% (40 persons) of employees is 50 years or more. The oldest person in company is 71. The fundamental strategy of human resources management consist on the rule of equal treating despite of the age, supporting each group of employees. Since the beginning the company has developed and realized long-term strategy of age management and employment of workers 50+.

The age management strategy includes many practices supporting older workers and carrier planning and development, i.e.:

- recruitment and employment – since the beginning the company has based on older workers due to their experience and knowledge, which are the most valuable attributes in this profession
- regular trainings – provided for all workers; regularly conducted are also surveys investigating the expectations and needs of training and development
- flexible employment forms – older workers, also the retired one, are often employed on a freelance basis
- flexible working time for employees 50+
- development of safe work environment – regular work place monitoring and assessment of work risk
- system of promotions, salary motivation and continuous carrier development – the structure of company is hierarchical with many stages of promotion; each higher position equals to different duties and competences, as well as to higher payment
- regularly conducted researches of employees satisfaction, meeting with employees
- health protection system for employees - including regular medical examinations and consultations and inspections of work environment. Employees 50+ have additional specialist medical examinations (e.g. women – mammographic examinations, men – examinations for prostate).
- 15-minutes breaks for physical exercises, included in work time
- access to well equipped gym and sports rooms – which are very popular among employees
- preparation to the transition to retirement, help in the formal preparations
- integrative programs – excursions, camp fires, holiday meetings, company jubilees, integrative meetings
- support and help for employees – in a form of financial supplement for holidays, benefits in case of long-term illnesses or difficult life situations, low-interest loans for employees.

3. Development of the initial measure and current practice?

General approach, recruitment and flexibility of work

The main factor contributing to the development of age management approach and practices supporting older workers was the specificity of this kind of professional activity. Years experience and knowledge cannot be replaced. Thus older worker constituted the basis for company development. From the beginning in 1998 WORD has attempted to recruit personnel with experience and professional preparation. Those were in a major part persons 50+ or even pensioners. Along with the development of the company the employment has increased. During recruitment skills and experience has played the crucial role, what resulted in engaging many persons over 45 or 50 years old. Among employees are also handicapped persons.

According to the employer the fundamental advantage of workers 50+ in WORD is their experience and knowledge. These are the crucial attributes of examiner and diagnostic. Additionally, older workers willingly share their experience and transfer skills to younger colleagues. Older workers are more mobile and better find themselves in a shift work. According to the analysis, they also rarely go on sick leaves.

Older workers have also the possibility of flexible working time and conditions. Very often retired persons are employed on a freelance basis.

Trainings and education

At least once a year each worker has a internal or external training. The most trainings are organized for examiners (among them 17 for 30 are 50+). Employer provides also for all employees training of more general knowledge, not necessarily referring directly to the characteristic of their work and duties, e.g. practical training of pre-medical aid (including lectures and practical exercises on dummies), specialist driving and eco-driving trainings. The company finances (fully or partly) variety of other external professional trainings, courses or studies, which might help to improve the general or specific skills and competences of employees. According to the employer all such training not only improve the specific professional skills or more general competences, but also improve the loyalty and engagement of employees.

Transition into retirement

WORD helps persons preparing to go on retirement, most of all in complete of documents and formal preparations. These employees do not have to visit Social Insurance Institution (ZUS), wait in queues and go into details of all complicated regulation and procedures. Older employees receive are a possibility to continue work after achieving the eligible retirement age on the same basis or with reduced working time. The company devotes some financial support (form the company work fund) for retired employees (in form of holiday benefits, recreation and sport activities, cultural activity, medical benefits). Retired employees may also participate in all excursions, events and meetings organized by the company. It is especially positively assessed by the older workers, approaching the retirement age, as they may feel more stable and secure having some additional support.

Other practices

According to the regular internal surveys employees especially positively assess work climate, as well as initiatives for physical activity and for integration. WORD is considered as a good and stable employer. Company management considers also the first aid trainings for personnel as a good practice. The company plans to continue those and other age management practices. Trainings and courses for workers 50+ co-financed by European Union are planned to be continued on a larger scale.

4. Concluding reflections from the researcher

The high share of employees 50+ is a result of two main factors. Firstly, experience and knowledge are the most valuable resources in professions of examiner and diagnostic. It is rational for the company to keep older workers in a good psycho-physical condition. In this way the company is able to utilize the most valuable resources of human capital. People are motivated and engaged. Secondly, since the beginning the company is developing and increasing employment without mass dismissals. Despite of single cases there was no need to dismiss any employees. Usually people continue their work for WORD until retirement. Only in the last time the market situation has significantly changed and the demand for examiners has lowered. This will probably result in reducing of the number of examiners, however age itself will not be decisive factor.

WORD is considered as a good and stable employer in region. According to internal satisfaction surveys and interviews with employees the company provides a wide range of possibilities that improve the work quality and work climate. The most valuable practices that significantly support older workers and career development are flexible work conditions, a broad set of internal and external trainings and courses (including co-financing of studies) and practices referring to preparation to retirement. People who achieved the eligible retirement age may continue work on the same or different basis. Some employees use this possibility. Finally, initiatives for integration (e.g. meetings, excursions, events) and for physical activity (e.g. free and well equipped gym and sports rooms) help to create a good and friendly atmosphere.

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CASE 3: KAMPOL

Executive summary

KAMPOL is a located in Legnica and commonly known in Lower Silesia producer of baker's and confectioner's articles and an operator of grocer's shop net - MINIMAX. The owners, Agnieszka and Jacek Kamola, are very active on the social and local field, what resulted in numerous awards and distinctions. In 2009 KAMPOL company for its activity for older workers was awarded (as one of 3 laureates) in the national contest "Benefit 50+", organized by The Academy for the Development of Philanthropy in Poland.

The company is strongly based on older workers (50+), who constitute about 50% of the personnel. In retail trade they are valued for their good contacts with clients, honesty and reliability. While in production – for their experience and competences. In company there could be found multigenerational teams, in which older workers share their knowledge and skills with younger ones. The basic form of knowledge transfer and human capital development is thus mentoring. The company has also developed solutions supporting employability of older workers, i.e. incentives to work after the eligible retirement age or to combine work with the retirement. A very strong emphasis is placed on creation of safe work environment and adjustment of work place for older or disabled workers. Employees have also possibilities and they are encouraged to volunteer in Children's Friends Association, established by the company.

1. Organisational background

KAMPOL company is a main part of the network of 6 trade-production-service firms on Lower Silesia managed by Mr. Jacek Kamola together with his wife Agnieszka. They begun their business in 1992 as a small family business and have significantly developed in following years, maintaining however the character of family enterprise. They produce groceries (baker's goods and confectioneries), and their trade activity could be recognized by a net of retail trade shops MINIMAX, and as well – but in small fraction – they also are active in service sector (mostly in catering). Their business activity covers whole Lower Silesia, the south-west region of Poland. All companies of the net employ about 100 people on the basis of contracted of employment (about 60% in trade, 30% in production, 10% in services). In commerce work only women, while in production about 90% are men. There are no trade unions in the company.

Since the beginning, KAMPOL implemented a mission of socially responsible company, what occurred in creation of friendly work environment, as well as engagement the firm and the owners in social activity at local level. The company has been awarded with numerous prizes and distinctions, including awards for the best entrepreneurship in Lower Silesia and the nationwide title of Ice-Breaker 2006 (*Lodołamacz*) in a contest of Polish Organization of Employers Handicapped Persons (*Polską Organizację Pracodawców Osób Niepełnosprawnych*). Their actions for activation of disabled were also honored by awarding Golden Mark in Social Campaign egne "Fully resourceful" in 2008. For the activity for legal protection of work and assurance of secure conditions and familiar environment of work the Regional Labour Inspection Office in Wrocław awarded to Kampol "Special Distinction" in

nationwide contest “The Employer – organizer of safe work”. Mr and Mrs Kampola are co-founders of the Business Club in Legnica which associates micro, small and medium companies from the district of Legnica. They cooperate with voluntary non-governmental organisations. Its Involvement in social activity, supporting of entrepreneurship and creation of new and safe workplaces resulted in awarded Mr and Mrs Kamola the title of “Citizens of the Year in Legnica”. In 2009 for the entirety of social and professional activity the Town Council honoured Mr Jacek Kamola with the title of “Meritorious for the city of Legnica”.

In 2008 the company for the activity in favor of older workers received a prize in nationwide contest “Benefit 50+”, organized by The Academy for the Development of Philanthropy in Poland.

2. Age management approach

Employees 50+ constitute 50% of the workers. The company, consciously developing the image of a socially responsible firm, realizes a long-term policy of age management and employment of workers 50+. It is based on cooperation of the owners (as most actions depends on their attitude and approach to older workers), human resources department, work's safety services and professional consultant. The age management strategy involves a broad set of solutions and measures:

- practices and trainings for young apprentices provided by workers 50+
- model system of competences transfer (mentoring)
- training are offered to all workers. The younger should learn and gain experience, while the older should update their competences.
- work place monitoring, adjustment of the work place to requirements and needs of workers
- development of safe work environment
- health protection system for employees, including regular medical examinations and consultations and inspections of work environment. The employee provides additional assurance and health services
- intergenerational cooperation, expressed in creation of aged-mixed working teams, as well as trainings in communication
- practices referring to employment exit and the transition to retirement, that enables and support continuation of employment after achieving eligible retirement age
- relatively broad flexibility in cases of urgent situations, e.g. care obligations
- regularly conducted researches of employees satisfaction
- motivations are improved by different kinds of contests, financial bonuses and prizes in form of additional services (e.g. medical examinations).
- engagement of workers 50+ in social activity, for instance in volunteering in NGO organizations like Children's Friends Association, established by the company, or Liga Obrony Kraju.

According to the owner, the attitude toward older workers in the company results first of all from the individual approach to work and workers, as well to older people in general. It is in a significant part based on the personal socialisation and education patterns in worker's families and management patterns transferred from big state companies. What is also important is a fact, that workers 50+ are highly respected in bakery and confectionery branches. Immensely valued are experience and skills, gained by years, which are later on passed down to younger workers. For the company significant as well is the stability and loyalty of older employees. The labour market situation of unemployed people 50+ is difficult. Thus, they usually agree for any kind of work and work conditions. However it does not mean that that should be treated as a cheap work force.

3. Current practice and how it has evolved

Except the personal attitudes and opinions of the owners, employment of workers 50+ and the development of age management policies through the years has been dependent on few additional reasons. On the one hand, in retail trade the decisive factor was the character of local labour market in the branches of commerce and services during transformation years. Younger people could find employment in other places, i.e. retail trade networks and hypermarkets, while for older people the labour market reality was not so positive. However, the later they were very competent for the work in small retail trade shops. It referred especially to women. Older women have better competences for positions in such places: they are pleasant and agreeable to clients, they can establish personal contact much better, engage in conversations, they can attach a client to the shop and become a part of local society.

On the other hand, in production older workers were the best specialists in such branches like bakery and confectionery. They possessed a years experience, knowledge and skills, which are the highest values in these professions and could not be learned fast during any school or training. The work in bakery has also its specificity. It is a night work with irregular rhythm, which requires from the workers a special and stable lifestyle. Basing on experience of the owner, older workers are considered to be more reliable in such work and, what is also important, more honest. Problems of theft or bad work has happened significantly more seldom then in a case of younger workers. The development of productive part of the company was based mainly on employment of older and more experienced specialists and on creation of multigenerational teams, in which the skills and knowledge was passed down.

Today, the fundamental factor for development of employees' skills is mentoring and teamwork. It is impossible to train a person for the profession of baker or confectioner in a short period of time. Teams of younger workers are created around an older specialist. It is reflected also in the process of recruitment and career planning. When an older person-specialist approaches the retirement age, another person, which could take over his functions and duties, is sought.

Important elements of age management in KAMPOL are practices referring to employment exit and the transition to retirement. The company enables and support continuation of employment after achieving eligible retirement age. The achievement of retirement age itself is a ceremonial treated with honours and respect. It is followed by a conversation with the person about her or his plans for the future. The people are very often highly valuable and irreplaceable employees. The employer offers further employment, usually on a different

position, on different basis (e.g. mandatory contract) or in smaller amount of hours, yet on conditions which do not deteriorate the financial situation of the person. Depending on the individual preferences and situation some employees chose to combine work and retirement, other chose only the work. Until now about 10 such conversations took place.

4. Concluding reflections from the researcher

The development of age management and measures supporting older workers in KAMPOL is a result of two fundamental factors. The first is the individual attitude and approach of the owners. Mr and Mrs Kamola are very engaged in local and social activity, especially in favour of disabled persons (also workers). The second factor supporting development of age management was the specificity of the branches in which KAMPOL functions. In bakery and confectionery the experience and skills, gained through years of work, are the crucial factors. In small retail trade, older women are usually the most competent workers. Thus, workers 50+ have been always welcomed in the company.

KAMPOL is locally known as a good and stable employer. The social and local activity can be also used as a marketing tool for promotion of the company label. The character a medium size family business helps to keep a contact and personal relations with workers. The company is an excellent example of a socially responsible company, which combines the philosophy and attitudes of the owners with the requirements of the business venture in a way that bring profits both to the company and to employees.

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CASE 4: Company: TP EmiTel Sp. z o.o.

Interviewee: 2 (HR Director and HR Specialist)

Executive summary

EmiTel is the leading private terrestrial radio and TV broadcast infrastructure operator in Poland. It employs 933 workers, of whom 33% is 50+ and 56% is 40+. The average age in the company is 43 years.

EmiTel is a good example of well-developed system of career planning, training and development of employees. The company carries out a comprehensive and deliberate policy of human resource management, taking into account older employees and the process of ageing. The company recently introduced new and interesting solutions which help to maintain and develop their competitive advantages.

The good age management practices in EmiTel refer primarily to the field of competence development and knowledge transfer: (a) the program of "Internal coach of TP EmiTel" engages older, experienced specialists to share their skills and knowledge with younger colleagues; (b) the whole system of training and career planning (including a special program for managers) enables development to all workers and supports multi-generational relations.

Another very interesting solution, which significantly improved the human resources management was implementation of the system of internal evaluation. The system was useful not only in evaluating workers, but as well in planning the development of competencies and skills of employees (by appropriate training) and planning the development of the whole company.

1. Organisational background

Metadata:

Criteria	Parameter value
Size (employees)	- Large (933)
Sector	- Services (Broadcast infrastructure operator) - Private
Work council	- No - There are trade unions
Business volume	- <i>no information</i>

EmiTel is the leading terrestrial radio and TV broadcast infrastructure operator in Poland. The company provides services in analogue and digital terrestrial transmission, as well as broadcasting of television and radio signals.

EmiTel is a nationwide private company with the headquarters in Krakow (where interviews were made) and Warsaw. Regional offices are located in Gdansk, Lublin, Katowice and Poznan. It belongs to TP Capital Group. EmiTel was formed in May 2002, however, the tradition, history and organizational structure of the company are much longer. The history

goes back to the beginning of the radio communication technology in Poland. The first network of transmission facilities in Poland was built after World War II and some elements of this infrastructure are presently owned by EmiTel. In the early 1990's companies involved in radio broadcasting formed the radio part of Telekomunikacja Polska (Polish Telecom). In 2002 EmiTel seceded from the organizational structure of Telekomunikacja Polska as a separated private company, but currently the Telekomunikacja Polska has 100% of EmiTel shares.

The company employs 933 workers, of whom 33% is 50+ and 56% is 40+. The average age in the company is 43 years. Women in EmiTel are in a small minority and constitute about 15% (mostly in administration and sales, only 2 women are in technical groups). From 140 women only about 15% is 50+, while among men the share reaches 35%.

Table 1. The age and gender structure of employees (2010)

Age category	N	%	
30 and less	142	15%	
31-40	269	29%	
41-49	215	23%	
50-59	266	29%	33%
60-64	41	4%	
Total	933	100%	

Turnover of the staff in an annual basis does not exceed 8%. Usually, only 1,5% of this are retirement decisions. Most of the employees, about 600, work in technical sections, of which about 400 in technical groups (which work in the terrain).

EmiTel is the winner of the Competition "Profit from Maturity 2010" and may use the title of "Employer friendly to employees 50 +". In 2009 it received also the title of "Solid Employer of the Year" (*Solidny Pracodawca Roku 2009*).

There are trade unions in the company. The relationships between the management and trade unions were assessed very positively by the interviewees.

2. Age management approach

The company carries out a comprehensive and deliberate policy of human resource management, taking into account older employees and the process of ageing. Activities of the company refer primarily to the system of internal training and development of the personnel, which all put much attention to the older workers. Very interesting solution, which significantly improved the human resources management was implementation of the system of internal evaluation. EmiTel organises also the employees in age-diverse groups.

EmiTel seems to be a company that recognised the advantages of modern human resource management and age management. Recently, it introduced new and interesting solutions which help to maintain and develop their competitive advantages. The area of activity of

EmiTel are new technologies and therefore development and maintenance of specialist knowledge, experience and competencies within the organization is essential for success. For this reason, since several years the company has systematically implemented measures in the area of development and improvement of expertise, as well as transfer of knowledge within the organization, including care about the development of management skills in planning and organizing work of age-diverse teams. These initiatives, including the program of "Internal Coach of TP EmiTel" are described in the 3rd part of the report.

Besides, the company has developed an interesting and well-functioning system of internal evaluation, which governs all employees. In 2008 EmiTel introduced a System of Comprehensive Assessment and Development (*System Kompleksowej Oceny i Rozwoju - SKOR*), which consists of three elements: (a) annual performance evaluation, (b) assessment of competences, (c) assessment of potential and mobility. Respondents very positively assessed the system, emphasizing its usefulness not only in evaluating workers, but as well in planning the development of competencies and skills of employees (by appropriate training) and planning the development of the whole company. In 2009 there were 104 internal promotions based on the results of the annual evaluation, of which 25% were in the age group 50 +, and 25% in the group 40-50 years old. This showed to the management that skills and competences may be as well developed within the company instead of seeking them at the external labour market.

Along with development of the system of evaluation EmiTel has created job competence profiles for all positions in the company (about 170 positions). Each profile consists of 10 personal competences and up to 14 specialist competences. There are more than 300 types of competencies which specify positions in the company.

EmiTel supports and develops also the anti-age-discriminating recruitment system, which relies only on qualifications and competences of candidates. New people are employed on the basis of their fit to the specific job profiles. Thus, age of person is not a part of evaluation. As a result, 13% of workers employed as specialist and managers between 2008 and 2010 were 40 years and older.

The company conducts also systematic satisfaction surveys among employees. Since 2007 it is observed a constant improvement of workers' satisfaction. In 2009, over 78% of respondents were satisfied with the work in the company. EmiTel explains it as a response for implementation (at most in last few years) of many measures in the field of human resources management.

Another worth mentioning area of activity is a professional adaptation of new employees, regardless of their age, combined with development of internal identity and maintaining organizational culture. One element of the internal integration of workers and the company's identity is its social activity in which the company supports hospitals, clinics and foundations.

The company attempts to provide the staff with an access to all information about the situation of EmiTel, its policy and main decisions. It is enabled by an advanced intranet platform "Emi4me" and a magazine "EmiTime", published every month and created entirely by employees.

3. Current practice and how it has evolved

Metadata:

Criteria	Parameter value
Target groups	- Qualified workers
Type of measure	- Training, knowledge transfer - Career development - Other: personnel planning (age structure analyses)
Social partners involved	- Unknown
Scope of measure	- Overarching

The good age management practices in EmiTel refer to the field of competence development and knowledge transfer. Firstly, the program of "Internal coach of TP EmiTel" engages older, experienced specialists to share their skills and knowledge with younger colleagues. Secondly, the whole system of training and carrier planning (including a special program for managers) enables development to all workers and supports multi-generational relations. EmiTel has built its competitive advantage on qualifications and commitment of the competent staff. Professional competence, required in the company, particularly in the fields of radiofusion, teletransmission, teleinformatic, data communications and wireless telephony are unique and almost inaccessible at the external market.

In 2008 EmiTel developed a programme of transferring specialist, technical knowledge, called "Internal coach of TP EmiTel". The program involves persons 50+ in roles of trainers, who in formal and structured manner, with appropriate support, share their knowledge with younger colleagues. In 2008-2010 a group of 15 employees (of which 8 were 50+) was engaged as internal coaches. These were specialists in the fields of radiodiffusion, teletransmission, teleinformatics and wireless telephony. Internal coaches are spread throughout the country in order to cover with their activities all regional offices. In 2008 there were 41 trainings organized with 224 participants; in 2009 – 58 trainings with 346 participants; and in 2010 – 66 trainings with 389 participants. The company plans to develop the program.

Employees selected as internal coaches, have often previously functioned as "informal" specialists and advisers. Such persons had been recognised by supervisors. The company decided to formalize their role and provide them with adequate support and remuneration. They were given the opportunity to participate in the trainings of trainers workshops and group work, use of modern interactive teaching methods (e-learning, blended-learning²), as well as external trainings in areas of their specialisation. Workers-coaches receive additional compensation for their work.

The program has proven to be very successful. Currently, trainings within the program count to 85% of all development activities in areas of expertise in the company. The program has also brought financial benefits - the costs of external specialized trainings from similar areas would be at least 10 times higher, what would prevent to cover such a broad part of the staff

² A method of teaching which combine different learning environments and techniques like traditional face-to-face teaching and interactive computer methods.0020

with trainings. What's more, experienced specialists are able to share their specialists, unique knowledge and skills gained through the years of work in the company and receive adequate benefits for their services.

Since one year EmiTel runs also a program of special trainings for the group of Managers of the Technology Groups. This is a group of 29 managers, among which 45% are 45 years and older. These trainings are focused on the development of competence in managing teams, motivating employees, delegating responsibility and group communication. Particular emphasis is put on the management of age-diverse work teams. At the beginning of the program the company diagnosed the competence of technology groups managers. On this basis, and during interviews with managers, there were created individual development programs. Group trainings and individual activities were carried out through the whole year after which the competences were re-diagnosed. The results were very satisfactory - all managers significantly improved their skills.

4. Concluding reflections from the researcher

EmiTel is a good example of well-developed system of carrier planning, training and development of employees. The company functions in a specific field, base primarily on a stable, highly skilled and experienced staff and requires specialist knowledge. Such specialists are rarely met at the labour market. What is significant is the fact that with relatively small turnover rate (8%) and 56% of employees 40+ the company is aware of the fact of the ageing of the staff. Therefore, EmiTel had to seek for solutions which could help to maintain their position and potential. The company implemented various programs for improvement and enhancement of qualifications of employees and managers. Actions undertaken by the company contributed as well to decline of the costs, such as those related to training and advisory services for employees.

EmiTel is an example of a company that on time recognised its strengths and weaknesses, as well as the threats referring to the future potential problems. Implementation of long-term policy of employee development should help to deal with the problems of supply of proper candidates and ageing of the staff. Instead of seeking specialists at the external labour market the firm decided to train such specialists among employees with help of the most experienced and talented staff.

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CASE 5: Company: VATTENFALL HEAT POLAND S.A.

Interviewees: 1(HR Director)

Lonigitudinal case (Active Ageing project)

Executive summary

Vattenfall Heat Poland S.A. is a part of the international Vattenfall group. It employs 1,114 workers of whom 43% are 50 and older. In the following seven to eight years, almost 50% of the employees will be eligible for retirement. In the near future, Vattenfall will have to face the problems of numerous retirements and a shrinking labour market. Therefore, in order to provide a sufficient level of skilled staff, the company has developed long-term strategies for the employment and development of its employees. It is composed of a broad set of practices, including cooperation with schools, which can supply the company with young candidates; strategies for career and skill development; job rotation programs; age-diverse team development; recruitment of new employees; and mentoring and training programmes. These practices support the preparation for the potential supply of future workers, the development of specific skills, as well as practical and tacit knowledge. They also take into consideration the ageing of the workforce and the differences between generations. The cooperation of young and older generations often requires a changing of attitudes, mainly among older managers. All of these practices constitute a comprehensive and coherent approach that will allow long-term stabilisation of employment and guarantee a proper competence structure. The management of the company understands that the experience of senior employees is a resource of strategic meaning that is crucial to future success.

1. Organisational background

Metadata:

Criteria	Parameter value
Size (employees)	- Large (1114)
Sector	- Services (power industry) - Private
Work council	- Yes
Business volume	- <i>no information</i>

Vattenfall Heat Poland S.A. is a part of international Vattenfall group (Sweden, Finland, Denmark, Great Britain, Netherlands and Germany). In Poland Vattenfall has been operating since 1992. In 2000, it purchased the shares of the privatized Elektrociepłownia Warszawskie S.A. and established Vattenfall Heat Poland S.A. Vattenfall today is the biggest foreign investor and the fourth largest company in the Polish power industry. It is also the largest heat producer and seventh largest electricity producer in Poland.

Vattenfall Heat Poland S.A. employs 1,114 workers of which only 15% are female. Forty three percent of the workers (483) have reached the 50 year old, and an additional 32% of the workforce is between 41-50 years old. The average age of the workforce is 47.

Age groups	<=30	31-40	41-50	>50	Total
Women	21	35	51	62	169
	12%	21%	30%	37%	100%
Men	61	155	308	421	945
	6%	16%	33%	45%	100%
Total	82	190	359	483	1114
	7%	17%	32%	43%	100%

In the following seven to eight years almost 50% of the employees will be eligible for retirement.

The educational structure is presented in the table:

EDUCATION	WOMEN	MEN	TOTAL	
Primary Total	0	149	149	13%
Primary - Vocational	0	117	117	11%
Secondary Total	69	474	543	49%
Secondary - Vocational	54	436	490	44%
Higher Total	100	322	422	38%
Higher – PhD.	0	1	1	0%
Higher - MBA	4	24	28	3%
Higher – M.A. + postgraduate	6	9	15	1%
Higher- M.Sc.Eng.	9	83	92	8%
Higher - M.A.	68	191	259	23%
Higher - B.A.	13	14	27	2%
TOTAL	169	945	1114	100%

Most of Vattenfall's employees are skilled workers (electricians, mechanics) and high-skilled (engineers, management) workers. Most of the staff has secondary (44%) and tertiary (38%) education.

The average tenure is also very high and many people have worked in Vattenfall (and previously in the former public company) for more than 40 years. The company, if it employs somebody, attempts to keep him – dismissals are rare.

Trade unions exist in each unit of Vattenfall. At the level of all Business Groups, they are represented by a council. Regular meetings are held between management and union leaders to inform employees about business matters and future plans regarding sales, production, investments and staff issues. The participation of employees in company affairs is guaranteed in several legal acts. Also, the Social Guarantee Package ensures certain rights for employees, including the election of a management board member for employee and social matters and supervisory board members representing the employees for a term of four years.

2. Age management approach

In the near future Vattenfall will have to face the problem of a lack of new, young and well-educated workers. Due to the reforms of the education system in recent years, the profession of electro-energetics was liquidated at the secondary school level. Engineering

studies is also less popular nowadays. Vattenfall, with cooperation of PKPP Lewiatan (one of employers' organizations) has moved to re-establish electro-energetics on the list of professions. Probably next year (2011) it will return to the list of specializations in secondary vocational schools. Today, however, the problem is not a supply of young skilled candidates, but a lack of tenured and experienced specialists in the labour market.

Vattenfall analyses the organisation's competence structure and future needs in order to secure access to the necessary skills and competencies. In order to provide a sufficient level of skilled staff in the future the company has developed long-term strategies of employment and development of employees. It is composed of a broad set of practices, including cooperation with schools, which can supply the company with young candidates, strategies of career and skills development, job rotation, recruitment, mentoring and training programmes.

Vattenfall has implemented a Policy of Employees' Development that defines the rules and tools for the development of competencies of workers. One of the basic rules of the policy is a rule of equality, aiming to eliminate any occurrences of discrimination, including age discrimination. Every two years the company develops the "Strategy of human resources management in Vattenfall", which also emphasizes the meaning and value of older workers. The company attempts to **maintain the age-diverse structure** of its employees. The human resources policy strategy also emphasizes learning as a continuous process.

Vattenfall has taken a broad approach to attract young, competent and skilled workers and university graduates to join the company, facilitating the **generational shift**. It aims to obtain the reputation of a highly attractive and prospective employer for younger workers (according to surveys in local schools and universities it is perceived in this way). However in the power industry, the training of a new, inexperienced person to a self-reliant work takes at least one and half years. In this period such a worker may need to be guided by an experienced and tenured mentor. Almost 70% of the employees who work in the company (in Vattenfall and in the former public company) have been there longer than 20 years. Older employees are valued for their knowledge about the firm and the branch, their experience, contacts, and as well as for their loyalty. A high share of older workers improves the stability of employment (as younger workers are much more likely to change jobs). It also enables the **continuous transfer of knowledge and skills**.

Also worth mentioning are other practices. For instance, **retirees** at Vattenfall Heat Poland have permanent access to medical services on the same basis as regular employees. The firm also regularly conducts satisfaction surveys among employees.

3. Current practice and how it has evolved

The company has implemented a few programmes aimed at transferring knowledge within and outside of the company. Internal practices focus on a well-considered policy of career development, which strongly emphasizes the role of training, mentoring and age-diverse teams. These practices support the development of specific skills, as well as practical and tacit knowledge. Outside activities are aimed mainly at the preparation of a supply of potential future workers. The cooperation of younger and older generations often requires a changing of attitudes, mainly among older managers. All of these practices, described in

detail below, constitute a comprehensive and coherent approach that will allow the long-term stabilisation of employment and guarantee a proper competency structure.

Mentoring and knowledge transfer within company

For a few years Vattenfall has regularly employed new young workers who need a relatively long period of adaptation. For instance, for a project for engineering graduates, the company engaged 25 young graduates last year and about five to six graduates this year. Each new worker, even a young engineer, should get through a few positions in each branch of activity in order to learn how the whole company functions (e.g. managers have to understand the specificity of each job and work; salesmen need to know in practice the products that they sell; buyers have to know what products the company really needs). Afterwards, the employee gets to the target position. During the whole initial training period, the worker is supervised by his mentor - an older, experienced worker and highly-skilled specialist. For instance, currently there are few workers who, in the future, will work in financial management. Now they work in production, however, they have at all times, a personal mentor (experienced employee) from the financial management department.

Vattenfall carefully recruits internal experts for role of mentors. One of the related projects is "The Vattenfall's Expert" (*Ekspert Vattenfall*). It is addressed to highly-skilled specialists from the company, most of whom are 50 years old or more. The main goal of the project is to improve competitiveness through cooperation and sharing of experience within and outside of the company. Experts participate in a series of workshops dedicated to knowledge management, creativity, group communication and auto-presentation. Later on these internal experts train new workers, manage vocational training programmes, and also participate in outside activities such as conferences and lectures in schools and universities, job fairs and open days.

Presently, the company is attempting to gain EU co-financing (from "Human Capital Operational Programme") for a project to develop employees' skills. Within the project older more experienced workers will be prepared to the role of instructor of practical vocational training instructor, mentor and/or tutor for trainees and new workers.

Training

Vattenfall provides a wide range of training possibilities: (a) internal training programs offered to specific professional groups (regardless of age) – both vocational and "soft skills" trainings; (b) external trainings and schooling which each employee may participate in if it is related to the job profile. Persons aged 50 and above frequently participate in all types of trainings, also e-learning courses. The company covers the majority of the costs of external education (often 100%) and offers additional training leave. Employees can develop their skills on all levels of secondary and higher education (e.g. B.A., M.A., postgraduate, MBA, PhD). For instance, there is one employee who has progressed from secondary school to MBA during his work at Vattenfall. Each worker can also participate in language courses if it is related to his duties. In recent years Vattenfall has taken part in EU programs aimed at workers aged 50 and older. Approximately 60 persons have participated in language, computer and technical courses.

The Human Resources Manager mentions not only the advantages of external training, knowledge and studies, but also emphasises that contacts with other environments and people from different branches is important. This is particularly important because for many

of the workers (especially older ones) Vattenfall, is their only workplace. Contact with the “outside” world may widen their perspective, allowing them to compare practices and situations of other companies, and potentially sharing additional experience and ideas.

Another interesting practice regarding engaging older workers is a cyclical programme called “The Masters’ Academy of Skills” (*Akademia Umiejętności Mistrzów*). It is addressed to 35 masters of production (whose average age is 50) who manage and coordinate work in a production plant. The programme supports the development of managerial and leadership skills.

Knowledge transfer outside of the company

The previously mentioned programme “The Vattenfall’s Expert” (*Ekspert Vattenfall*), is addressed to highly-skilled specialists who will function as internal mentors and tutors. This program also puts a strong emphasis on knowledge transfer outside of the company. Besides the internal activity, Vattenfall’s Experts participate in conferences and lectures in schools and universities, job fairs and open days. This external activity aims to interest and acquaint young and talented people with the energy sector and Vattenfall. Vattenfall’s Experts might be called “ambassadors” of the older, experienced employees among younger generations in Vattenfall, as well as energy sector in general.

Vattenfall has entered into cooperation agreements with two secondary schools (from Warsaw and Radom) that will educate students within the energy profession. It has resulted in the creation of class profiles consistent with the requirements of the branch. Company instructors support the education in these schools and give lectures. Vattenfall has also found special scholarships, equipped laboratories and workshops, and organised vocational programs. Technical universities from Warsaw and Radom have joined the programme and this has enabled pupils to use their laboratories, libraries and participate in lectures. The schools and universities highly value this cooperation. It is a way of securing potential employment possibilities for the future. Nevertheless, even after well-educated young workers enter the company, they will require much training and the help of older and experienced staff (mentors and tutors). These may take a few years.

Changing attitudes

Human Resources Managers observe a significant generational change among employees. New, young workers differ in their attitudes, skills and expectations from the older staff. This has been a problem for many older managers, who often do not fully understand and accept this change (e.g. less attachment to work place and higher mobility, different requirements and expectations about working conditions and career development). They expected young workers to behave as they did 10 or 20 years ago. Thus, human resources management has had to undertake actions toward the changing attitudes of older staff (particularly supervisors and managers). They have to realize the generational change, the impact of transformation and technological change, and also have to understand that they can learn from younger colleagues. The company has prepared articles about generational change, differences between age groups and age management (published in Vattenfall’s Management Channel in the Internet).

4. Concluding reflections from the researcher

The company has developed long-term strategies and many practices that allow a positive future. The management does not expect many problems with the supply of employees, even though about a half of current staff will retire in next seven to eight years. A well thought out strategy of preparing young workers to work in the power industry, transferring knowledge and experience held by senior employees (within and outside of the company), and career development policy will all help to face the problems of a shrinking and ageing labour market as well as extensive retirements. Vattenfall is a good example of a company that has implemented a long-term human resources management and strategic competence planning process. It has implemented a long-term policy of attracting, developing and retaining competencies that takes into consideration an ageing of workforce and differences between generations. Management of the company understands that the experience of senior employees is a resource of strategic meaning, crucial to the future success.

As a longitudinal case from Active Ageing project from the past it could be said that the company developed strategies and measures that can be considered as best in activating senior workers in workplace. At the time of the previous project they already had a plan on how to manage the changing structure of the workforce (thus the satisfaction survey was at that time quite important and a tool for sharing opinions and views of employees about working conditions and how satisfaction could be obtained and/or increased). It seems that at that time and now, this case is an example of 'good practice'.

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CASE 6: Company: Filter Service

Longitudinal case: EUROFUND project

Interviewee: 1 (HR Specialist)

Executive summary

Filter Service belongs to the private sector. It is located in Zgierz near Łódź and has been operating under its current name since 1992. In 2007, the company was described as an example of good practices in age management in the report of European Foundation for the Improvement of Living and Working Conditions.

The company produces filter materials and personal respiratory protection devices. Currently Filter Service employs 210 persons. More than 40% of the staff is older than 45 years of age. More than 50% of the personnel are handicapped persons. Although the company has not developed any formal programmes for age management, some good practices supporting older workers may be recognised. People who are reaching eligible retirement age are encouraged to stay at work (most of them do indeed stay – presently 57 people are working on retirement, mostly on a part-time basis). They are engaged in roles of mentors, and teachers or people stabilizing social relations within the company. Worth mentioning are also attempts for the creation of a safe working environment and adjustment of the workplace.

1. Organisational background

Metadata:

Criteria	Parameter value
Size (employees)	– Medium (210)
Sector	– Production (filter materials) – Laboratory tests – Private
Work council	– No
Business volume	– <i>no information</i>

The origins of Filter Service began in 1987 when today's owners established a private production facility operating under the handicrafts co-operative "Elektrometal". In 1992, the company evolved into a civil company "Filter Service". The company manufactures filter media and respiratory protection devices. It produces products for both Polish and European Union customers. Most workers are employed full-time and on a contract for an indefinite period of time unless they prefer other forms of employment.

Since the mid-1990s, the firm has been seeking solutions for the social problems of handicapped people in the Łódź and Zgierz metropolitan area. The company has been designated with the status of the Supported Employment Enterprise. Currently Filter Service employs 210 people of whom more than 50% are disabled. More than 41% (87 persons) of the employees is 46 years old or more. Fifty seven of them are already formally retired. Eight employees are 60 years old or more. There are no trade unions in Filter Service.

2. Age management approach

The company has not developed any formal age management programmes; however, it practices some age management measures:

- Recruitment and employment – e.g. one HR specialist is a 59-year-old woman who was delegated by the company for a course on vocational counselling. In Filter Service her experience and decisions about employee motivation are very much appreciated;
- regular trainings – all employees are provided with periodic trainings which give them the possibility of adjusting their skills to the technical and technological changes introduced into the production system;
- flexible employment forms (not only for employees aged 50 and above) – employees themselves choose how they prefer to work. They make proposals for limiting their working hours or change the hourly rate for their work. At work there are also “masters” who analyze the work of employees and advise how the work system can be more profitable for the employees;
- creation of a safe working environment and adjustment of the workplace – the company makes adjustments at the workplace, especially for disabled people and for older workers. Workers themselves also submit proposals for changes in the company. The authors of the implemented proposals are rewarded by the employer.
- health protection system for employees –capital fund of people with disabilities;
- support and help for employees – camps for children, social events, quarterly cards for New Gdynia Station (sports centre), vouchers for Christmas (300 PLN);
- efforts to develop a friendly work atmosphere, in which healthy people work together with the handicapped.
- assistance to employees in the completing and/or filing of Tax Forms.

3. The original measures

Filter Service has been presented as one of four companies that are a good example of age management practices in the project from the European Foundation for the Improvement of Living and Working Conditions in 2007³. A short description of Filter Service's accomplishments emphasized a few measures:

- anti-age-discrimination policy in job recruitment and career development
- trainings
- friendly and family work atmosphere
- support for extending employment beyond the eligible retirement age.

Significantly, the last point is worth mentioning. Filter encourages employers to stay in the company, despite their eligibility for retirement, usually on a part-time basis. The company values knowledge and experience, as well as the social skills of its older workers. Therefore,

³<http://www.eurofound.europa.eu/areas/populationandsociety/cases/pl001.htm>

senior workers are employed as mentors and teachers. They have a better attitude toward work because they are not being forced to retire. Filter also offers comprehensive health care for their employees and retirees.

4. Development of the initial measures and current practice

General approach, recruitment and flexibility of work

Many employees have been working continuously for the last 15 years. They are aging along with the company and thus do not need to learn things from scratch. The HR specialist believes that young workers take too long to learn new things. Additionally, young people entering the labour market today do not want to learn because they expect to change jobs frequently. Therefore, Filter Service values older workers mostly for their experience, loyalty and engagement. The company also supports working longer than the eligible retirement age. Most of the workers who reach retirement age after one day of vacation (with the consent of the employer) continue to work under the same conditions. The company highly values their knowledge and experience and therefore is keen on developing conditions for retaining them at work. Filter Service especially appreciates the social skills of its older employees. They are engaged as mentors or teachers for the younger employees.

Nevertheless, if the company is looking for a new employee for a full-time contract (mostly in positions of IT or accounting), these are often young people. For example, the company recruits/hires the best graduates from the Technical University of Łódź. The company also uses the services of Temporary Employment Agencies with large orders from clients, in order not to overload its disabled and older workers. Additionally, Filter Service does not sign short, three-month contracts. There is also the option that children of older employees can come to the parents' workplace.

Health protection

Rehabilitation programmes are funded by the company. One doctor and two nurses are permanently employed by the firm. There is one nurse per shift and a doctor comes once a week to review the applications for which workers get full reimbursement for drugs, orthopaedic equipment, hearing aids, repairs, and batteries. In the past, a HR specialist was visiting workers in hospital, talking with doctors, and the company helped in the event of further trouble. Today, in such cases, a doctor goes to the hospital.

Other practices

Interesting practices are also so called "rationalization proposals", which are unusual in other companies as the respondent emphasises. These are ideas from employees about the possibilities of the improvement of their working conditions. They are analyzed and – if accepted - implemented by the company. Employees who suggest the innovations are rewarded. An example of a rationalization proposal is a request for foot rests for people working on the production line that reduces the discomfort of seated workers and potential problems with the spine.

5. Concluding reflections from the researcher

Filter Service is primarily a Supported Employment Enterprise. It employs disabled workers, however it is still unknown whether it will continue to do so when announced changes in the law will be implemented. A large percentage of older workers have not occurred as a result of deliberate action, but is the result of current employees aging together within the company. Although the HR specialist believes that it would be fairer to give work to younger people, older workers are valued for their loyalty, knowledge and better social approach to people – qualities that the younger workers lack. The company does not utilize any formalized age management strategy, however some good practices supporting older workers may be recognised. The most significant are: efforts for extending employment beyond the eligible retirement age and retaining older workers within the company (often in roles of mentors or teachers for their younger employees), as well as the creation of a safe working environment and adjustment of the workplace. Filter Service, as summarised by the respondent, does not have to create age management policies, as the solutions are simply worked out by life.

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CASE 7: Cooperatives - Case study in 3 companies

7 a: Spółdzielnia Socjalna "50+" (Social Cooperative "50+")

7 b: Radiotechniczna Spółdzielnia Pracy (Radio-technical Work Cooperative)

7 c: Spółdzielnia Budowlano-Mieszkaniowa „OAZA” (Building-Housing Cooperative OAZA)

Interviewee: 1 (HR Specialist of Radiotechniczna Spółdzielnia Pracy),

1 (Director of OAZA),

1 (Director of Spółdzielnia Socjalna "50+")

Executive summary

The report presents a form of cooperative (including social cooperative) as an example of enterprise and employment form which may be perceived as good practices in employment of older people. Work cooperatives perform economic activities in form of joint venture based on the personal work of their members. The social cooperative is a similar legal form. It allows to use economic activity to achieve social goals, primarily professional and social integration of people in difficult situation.

Inclusion of the cooperatives in the portfolio of good practices in age management was dictated by their role and potential in the professional activation of older people, especially people with various health problems or at risk of social exclusion, who cannot meet the requirements of the current labor market in Poland. The report includes 3 examples of different cooperatives.

The first one is the Social Cooperative "50+". It employs 7 older women (50+) after mastectomy (3 were previously unemployed and 4 already on retirement or pension). Before starting the cooperative they were mostly unemployed or retired. Older women with health problems had no chances to find work at the labour market. Thus, they decided to organize their own work place and enterprise. The company in 2010 was awarded in the competition, "Profit from Maturity 2010" in category "Employer Friendly to Employees 50+".

The second case is the Building-Housing Cooperative OAZA. It employs currently 18 workers and 8 of them is already on retirement. The cooperative employs mostly older people because of their better competences, attitude to work and reliability.

The third case is the Radio-technical Work Cooperative, which employs 18 people. 11 of them are already formally retired. The company is a place where people work for years, sometimes even since 40 years. It bases on expertise, skills and experience of older workers, who are mostly rare specialists in the narrow field of flexible equipment for warming body.

All cooperatives are considered as good practices primarily at two dimensions: the recruitment and employment of older workers, as well as development of friendly work atmosphere and work environment.

1. Organisational background

Cooperatives as a form of economic activity

Work cooperatives perform economic activities in form of joint venture based on the personal work of their members. Its legal status was regulated in the Act on Cooperative Law in 1982. Members work on the basis of paid cooperative work contracts. For work in a cooperative member receives remuneration, which consists of normal salary and participation in the part of the cooperative's income, which is intended for distribution between the members (in accordance with the principles set out in the statute). Cooperatives are subjected to the same rules as normal profit firms and companies, including the labor law, accounting law, tax law, etc. They function on the basis of economic rules and calculations and are responsible for its obligations with all property. Members of the cooperatives have to participate in the possible losses to the amount of declared shares. Each member has the right to participate in the management of the cooperative.

The social cooperative is a special type of work cooperative. Its status was legally regulated in 2006 (on the basis of the Law on Social Cooperatives). The social cooperative is a legal form which allows to use economic activity to achieve social goals, primarily professional and social integration of people in difficult situation. The members of social cooperative should be mostly people at risk of social exclusion (unemployed, homeless, people with health problems, disabled, people with previous alcohol or drug problems, mentally ill, people released from prisons, refugees). Social cooperative has to count at least 5 and not more than 50 people.

7 a: Spółdzielnia Socjalna "50+" (Social Cooperative "50+")

Metadata:

Criteria	Parameter value
Size (employees)	- Small (7)
Sector	- Care services - Private
Work council	- No
Business volume	- <i>no information</i>

Social Cooperative "50+" was founded in 2007 in Gdynia by 5 women aged 50+ with a history of a cancer. They got to know and became friends during their illness. They all belonged to the Association of the Amazons in Gdynia. Two of them were unemployed, and three were already on earlier retirement or pension, but wanted to work. Two of them were previously accountants, two - engineers, and one – a laboratory assistant. Older women after problems with the cancer had practically no chance at the labour market. Due to health problems they were also not able to perform every type of work. After three years of familiarity they decided to set up a social cooperative that would give them a paid job and at the same time would be a kind of therapy through work.

Currently, the cooperative employs 7 older women (50+) after mastectomy (3 were previously unemployed and 4 already on retirement or pension). They provide primarily care services (for the sick, disabled and older people), as well as cleaning services, distribution of advertisings and promotion materials to companies, private persons and the city of Gdynia.

For instance, the city commissions organization of dance and fitness classes and joint visits to the theater for women 55+. Members of the cooperative still work actively in the Association of Amazons in Gdynia.

The cooperative has no office. Members meet in their private houses.

Social Cooperative "50+" from Gdynia was in 2010 awarded in the competition "Profit from Maturity 2010" in category "Employer Friendly to Employees 50+".

7 c: Spółdzielnia Budowlano-Mieszkaniowa OAZA (Building-Housing Cooperative OAZA)

Metadata:

Criteria	Parameter value
Size (employees)	– Small (18)
Sector	– Construction and housing administration – Private
Work council	– No
Business volume	– <i>no information</i>

The cooperative was founded in 1993 in Lublin. It currently manages over 1,000 apartments and 600 garages in Lublin. Under the supervision of the cooperative there are also dozens of services. Currently, OAZA offers the use of 170 apartments within 2 months. Another building (for 120 dwellings) is being built.

OAZA employs currently 18 workers and 8 of them (45%) is already on retirement. They are employed, depending mostly on their preferences, on full time or part time basis.

The cooperative is developing rapidly and dynamically. Since 2007 it has sold 370 dwellings. It is the largest residential investment made by the cooperative. In Lublin the cooperative OAZA is one of the smaller cooperatives. Cooperatives in Lublin operate also in other parts of the city (LSM, Czechów, Czuby).

OAZA offers competitive prices. Flats are 30% cheaper than the ones offered by developers. This is an important factor, particularly in Lublin, where people are not very wealthy. Low prices are possible due to the fact that OAZA itself performs the preparation of investment and its supervision. It employs only contract inspectors.

7 b: Radiotechniczna Spółdzielnia Pracy (Radio-technical Work Cooperative)

Metadata:

Criteria	Parameter value
Size (employees)	– Small (18)
Sector	– Production (flexible body heating equipment)
Work council	– No
Business volume	– <i>no information</i>

Radiotechniczna Spółdzielnia Pracy (Radio-technical Work Cooperative) from Cracow is a manufacturer of flexible equipment for warming body. It specializes in high-quality electric blankets, pillows and shoes, which emit heat, improve blood circulation and help in rheumatic diseases. Heat therapy relieves joint pains, cramps and muscle tension.

Radio-technical Work Cooperative employs currently 18 people. 11 of them (almost 60%) is already retired. The cooperative is a place where people work for years, sometimes even over 40 years.

Traditions of the cooperative reaches back to 1947 when Technical Workers Cooperative of Polish Radio "STEP" was created. After the World War II technicians from the Polish Radio realized that demands for radio systems increased and that there were not too many professionals in this industry. In 1949 STEP started to produce electric ovens and security transformers. For a long time these were basic products produced by the plant. In the early 1950s the cooperative acquired liquidated private companies manufacturing plastic products and the cooperative "Elektromechanik". They changed their name into the present form: "Radiotechniczna Spółdzielnia Pracy".

In 1952 the RSP begins the production of electric pads which still are the main offered product. The cooperative was developing very fast and created service points outside Cracow: in Zakopane, Nowy Targ, Myślenice, Wadowice and other places. The range of services was wide: radio systems, telecommunication, electrical installation, repair and electro-medical equipment. In 1956 the cooperative was the first in Poland which started the production of electronic flash for photojournalists – "Fotonik".

Since mid-1970 the cooperative experienced some problems due to central government administrative decisions. It had to limit their production. Nevertheless, the company survived the period, got through the system transformation and still produces electric equipment.

2. Age management approach

The cooperatives have no defined age management policy nor any formalized human resources management. These organizations are rather small enterprises with, at least partly, participative management. Work cooperatives are aimed at income, nevertheless this form of organization is conducive to development of work conditions different than in normal profit companies, i.e. a good and friendly work atmosphere in which each worker is an important element of the whole team. Additionally, social cooperative is a form which, beside the economic goals, is aimed at social goals (activation and integration of people at risk of social exclusion). These sets slightly different framework for interpretation of human resources management measures than in standard profit companies. The most significant elements of it for each cooperative may be specified as follows:

7 c: OAZA

- Recruitment and employment – now in OAZA primarily retirees are employed. The Cooperative Board decides to employ them because of their availability and character traits: greater commitment, dedication, good relationships with residents, conscientiousness, diligence, experience;

- Flexible employment forms – employees in OAZA decide on their employment forms together with the employer (full time or part time). During certain times of the month, when OAZA employees settle gas and water bills, they work overtime;
- Mentoring – in the OAZA older workers are valued for their experience and share their expertise with younger workers;

7 a: Social Cooperative “50+”

- Work atmosphere and work conditions – services provided by the Cooperative are tailored to the capabilities of workers and the basic principle in the work is a mutual cooperation of women, trust, as well as share of knowledge and experiences.
- Training – members of cooperative attempt to improve their skills and adapt them to the job requirements. They participate in trainings co-financed by the European Social Fund.
- Flexible employment forms – the cooperative employs older women on full and part-time basis (what allows receiving pension or retirement). The work time is flexible, adjusted to health requirements of employees.
- The cooperative also serves as a kind of support group for older employees after mastectomy. It also organizes for the members rehabilitation holidays (every year), as well as weekly fitness and dancing classes. Members also provide voluntary support for women after cancer surgery.

7 b: Radio-technical Work Cooperative

- Mentoring – students come from electronic and electrical schools to the Cooperative and learn the profession from older and experienced cooperative’s workers;
- importance is attached to the atmosphere – at every opportunity the company organizes joint festivals and events (like Easter, Christmas, birthdays, name days of employees)

3. Development of the initial measures and current practice

Metadata:

Criteria	Parameter value
Target groups	– All workers
Type of measure	<ul style="list-style-type: none"> – Job-recruitment – Training, lifelong learning and knowledge transfer – Work and working time organisation – Work atmosphere – Health promotion and ergonomics and job design – Changing attitudes

Social partners involved	- Yes
Scope of measure	- Overarching

Inclusion of the cooperatives in the portfolio of good practices in age management was dictated by their role and potential in the professional activation of older people, especially those with various problems. Despite of the fact that each cooperative has different characteristic and function in different branch, we may distinguish few measures or approaches that are specific for this form of profit organization and this form of employment. Certainly, cooperatives differ, at least partly, from normal profit companies. They usually are (or at least should be) more friendly to workers, particularly those with problems (e.g. health problems) or people at risk of social exclusion, who cannot meet the requirements of the labor market. Especially, social cooperatives are peculiar tool of help, activation and integration for such people. Social Cooperative "50+" is directly addressed the employment of older women with health problems. It may be an example of initiative in which a group of people, mostly unemployed or retired, helped themselves by organizing their own work place and enterprise.

We may focus on two particular dimensions of the activities of described cooperatives, especially important for the activation and employment of people 50+: the recruitment and employment, as well as development of friendly work atmosphere and work environment.

Recruitment and employment

Social Cooperative "50+" was founded by five friends after mastectomy who meet in the Association of the Amazons. With their health problems unemployed or retired older women had almost no chance to find a work. The present Director found information about such form of organization as social cooperative. Together with few friends they decided to set up such cooperative. It was a chance for paid work, for activity and way for reintegration with the society, as well as kind of therapy through work. Despite of many initial problems, mostly of administrative nature, they succeeded. Two more friends joined theme, however later on the members did not wanted to engage more people in the cooperative, even though many women wanted join. Instead, they tried to encourage other older women to start their own cooperatives and build their teams. Social cooperatives, as noticed the respondent, has two goals: economic and social. In order to achieve the second one – in case of women after mastectomy - the team has to be well integrated, members have to trust each other. Thus, the size and economic potential does not have to be increased in order to bring profits to the employees. The economic dimension is not the crucial matter (in fact, incomes are rather low). Members of the Cooperative currently supports in development two other social cooperatives of their friends and help theme in initiating the organization.

OAZA is a different case. In the last three years, sold nearly 400 apartments, over 100 is currently under construction. These apartments represent more than a half of all housing administered by the cooperative. Therefore, the cooperative is planning to employ more office workers and House Hosts. For all these positions mainly retirees will be recruited. The Cooperative Management Board believes that retired people are more conscientious, hardworking, well experienced, trustworthy and independent at work. Company do not

publish job offers but ask residents for recommend persons who would like to work for them. At the first place employment is offered to the residents of the cooperative houses and flats.

Working in the cooperative is considered as something more than normal work, rather care of their personal properties. Only retired people can be employed as House Hosts, because of their availability, flexibility and reliability. Respondent emphasized that older people do not wait for commands (such as clearing of snow at weekend) but they come out with an initiative. They are open and helpful to the residents of the buildings. Retired people remember older times and feel a "community spirit" better, as it was called by the respondent. In addition, the Board of OAZA considers employment of pensioners as socially important activity – their cooperative can help older persons, activate them and the work can prove them that are useful.

Finally, Radio-technical Work Cooperative employs high-skilled and experienced workers. Their competences and abilities are very highly valued, but in much part only at the narrow field of specialization of the cooperative and technology that it uses. Years of work made them irreplaceable in the cooperative and stabilizes their situation, however, they would not so easily find job in other company.

Work atmosphere and work environment

In small cooperatives the working atmosphere is a very important element of the working environment. Since the cooperatives cannot guarantee their workers as attractive financial conditions as large corporate companies, the emphasis is put on the atmosphere there. Integration events, shared holidays and birthdays of each of the employees – with such a small number of employees it is possible to organize such events. The atmosphere has its consequences – in the surveyed companies workers decide not to retire despite of achieving eligible retirement age or to combine retirement with part-time work. Since the beginning of OAZA only one person has decided to work for another company. Radio-technical Work Cooperative is a place with long history where people work long (even 40 years) and remember about their tradition organizational culture. This also creates a specific, almost family environment.

Social Cooperative "50+" emphasizes that a friendly work environment is possible because the workers manage the Cooperative by themselves. Work in the company is adjusted to the capabilities of older, disabled workers. The basic principle in the work is a cooperation, integration and trust. Work in social cooperative is not only a source of income. It also allowed them to return to the professional and social life, to believe in their strengths and usefulness for the society.

4. Concluding reflections from the researcher

Small cooperatives do not have separate departments for human resources management. Nevertheless, this kind of enterprise and employment is an interesting example of good practices in employment of older people.

The three described cases, although different in organizational form and branch, are very friendly to their workers, of which most are older people. Cooperatives are especially

interesting possibilities for employment for people with various health problems or people at risk of social exclusion, who cannot meet the requirements of the current labor market in Poland.

We decided to join all three cases to present the cooperative as a form of interesting practice in employment of older people. The examples shows that older employees are there in majority. On the one hand, this proves that cooperative, if are successful, poses a big potential and create chances for older people, who cannot find work in other companies. It contributes to increasing economic activity in the age group 50+. On the other hand, it inclines to conclusion that older people (especially those with some problems) may be discriminated at the labour market and the cooperatives are for some part of theme the only form of employment. In many aspects employment in cooperative differs from employment in standard profit company. Some of those aspects have negative inclination (e.g. financial aspects, instability of work in many cases), however, some of theme proves to be very conductive for older people.

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CASE 8: Company: ANONYMOUS (Power Plant)

Interviewee: 1 (Vice Director of Personnel Management)

Executive summary

The company (thermal-electric power plant) is a private company, a member of international electricity group. The company produces heat and electricity for the region.

It has been chosen as an representative of sector with high average share of older workers (e.g. due to results of ASPA quantitative survey). The company is an interesting case among those investigated in the project ASPA. It has a very high percentage of employed people 50+ but this is not due to a well-thought strategy, but rather a remaining of the communistic system. Similar case (Vattenfall) was a very good practice. However, the reported company turned out not to be similarly good example in age management. Despite of few interesting measures (mentoring, retirement benefit) there are also some less positive aspects (general weak age management, negative attitude towards older workers).

The company employs about 470 workers. 48% of them are people over 50 years old. They work in the firm for many years, most of them practically since the beginnings of the company's in early 1990s. The history of the company reaches however few decades earlier. One reason for such a large amount of older people among all employees was the specific character of heavy industry and energy industry in the People's Republic of Poland before 1989. This industry was overstaffed in relation to the real demand for workers. For this reason, with the advent of the Third Republic of Poland and beginning of commercialization processes, it was practically unnecessary to recruit new employees. Employees have aged together with the company.

1. Organisational background

Metadata:

Criteria	Parameter value
Size (employees)	- Large (470)
Sector	- Energy - Private
Work council	- No
Business volume	- <i>no information</i>

The company (thermal-electric power plant) is a private company, a member of international electricity group. The company produces heat and electricity for the region.

The history of the company reaches few decades into the past. It was established in the socialistic period. After 1989 it went through privatisation.

The company employs about 470 workers. 48% of them are people over 50 years old. Older workers work in the company for many years.

Age group	%	
Less than 30 years	1,1%	
30-39	10,1%	
41-49	40,8%	
50-60	45,1%	48%
More than 60 years	2,9%	
Total	100%	

One reason for such a large amount of older people among all employees was the specific character of heavy industry and energy industry in the People's Republic of Poland before 1989. This industry was overstaffed in relation to the real demand for workers. For this reason, with the advent of the Third Republic of Poland and beginning of commercialization processes, it was practically unnecessary to recruit new employees. Employees have aged together with the company.

There are no trade unions in the company.

2. Age management approach

The reported company has no formalized solutions directed explicitly to the workers 50+ in their firm. However, it has developed some HR solutions which refer to older workers. Following measures are promoted:

- support and help for employees – voluntary leave programs for ordinary employees as well as pensioners;
- health protection system for employees – comprehensive health care, own medical clinic on the territory of the company
- creation of safe working environment – in the energy sector it is ordered to remove dust in the entire production department which is more like a laboratory now. Much attention is given to technical improvements and safety;
- mentoring – each new employee begins work under the wing of an older colleague who is his guardian in a particular position;
- training – annually 10 days of training per employee;
- multitasking – adaptation of workers to multitasking which raises their qualifications and salary and helps them to feel more confident at work. It also gives them more opportunities on the labour market;
- support for retirees – retirees do not have to leave their jobs even if there are no large staffing needs;
- bonuses – a system of performance bonuses based on objective criteria, jubilees (also awarded if an employee is missing a few months to the anniversary and now wants to quit work);

3. Current practice and how it has evolved

Metadata:

Criteria	Parameter value
Target groups	– All workers
Type of measure	– Mentoring – remuneration, i.e. consideration of bonus and salary systems – retirement benefit
Social partners involved	– No information
Scope of measure	– Overarching

System of financial bonuses and retirement benefit

The company has developed a system of financial bonuses for all their workers and high financial benefits for retiring employees.

During the People's Republic of Poland occurred a phenomenon in the companies as so-called "excess employment". Political changes at the beginning of 1990s brought changes in the labour market reality. Commercialization and privatization of public companies changed the system of management and new owners had to deal somehow with the relicts of former socialistic system, like surplus of employment or ineffective employment structure. Such problems together with continuous technological development have resulted in mass layoffs in many enterprises, especially in the heavy industry.

During transformation the reported plant have also faced this problem. Therefore the company created a special programme of voluntary departure which functions up till now. It helps retiring employees to obtain a high retirement gratuity. Each worker can benefit from this program: while leaving the company he or she will obtain 100.000 PLN (25.000 EUR) of severance pay. If the employee retires or has to leave work because of disability, his benefit pay is 120.000 PLN (30.000 EUR) plus the possible jubilee award (granted even if the anniversary falls a few months later). As for Polish reality this is a considerable financial support.

The company has implemented the bonus system in which workers are rewarded for positive results. The average annual premium for an employee is 6.000 PLN (1.500 EUR). What is important, the system of evaluation is clearly described, and there are no ambiguous decisions in premiums distribution as it has happened in the past.

Reported company cares for its pensioners. They receive an annual additional cash benefit as well as necessary assistance grants. The Social Fund for one employee is 9.000 PLN per year.

Mentoring

Every employee coming to the company has to go through the initial stages of their career with help of individual mentor. Young workers for about 1,5 year (however, in specific job sometimes longer) are provided with support of their colleagues who work here much longer. Mentors are experienced, mostly older (50+) workers. While going through various stages

the individual mentors change. The supervisor of mentors is the production manager. He controls the entire mentoring system and combines workers with proper mentors.

Other practices

Per year there are 10 days of training for each employee. In the years from 2009 to 2010, the company has acquired EU-benefits funds for training, allowing to employ more professionals than in previous years. Training is mainly concerned with soft skills of workers but also personnel management, management of the company and time management. An important element is a training to prepare employees to handle other jobs which makes them flexible and versatile. Virtually all workers in the manufacturing part of the firm are able to work on three or four workstations. It is written in their employee card index, has an impact on earnings, gives employees more confidence of their employment, and also makes them more attractive on the labour market in case of a change of a job. Sometimes employees have to change their workstation, not to forget how the work on the other ones looks like. In some cases, such changes are also motivated by health issues.

4. Concluding reflections from the researcher

The company has been chosen as a representative of sector with high average share of older workers (e.g. due to results of ASPA quantitative survey). Similar case (Vattenfall) was a good practice. However, the reported company turned out not to be a good example in age management as it was defined in ASPA project.

The company is an interesting case among those investigated in the project ASPA. It has a very high percentage of employed people 50+ but this is not due to a well-thought strategy, but rather a remaining of the communistic system. Since the commercialization and privatization there have been very few recruitment processes. Even during a scheduled recruiting to begin in 2011, only 10 people are going to be employed. Currently sought employees are young people. The company does not want to employ older people because it is not profitable to them to invest in someone who will soon go away. Management is rather not enthusiastic about such ideas as leaving salaried retirees. It is believed here that „Old people are physically and mentally deficient, e.g. they are likely to get amnesia“. They are also criticized for the lack of mobility and the fear of technical innovations (in the company new machines are being adopted quite often).

The facts that the company has a very good health care system, that it organizes a lot of trainings and helps its employees with high severance pays and other benefits, contribute to the conclusion that the branch of power is still a rich part in the industry.

Contact details:

No agreement for publishing contact details

CASE 9: Company: TopRonic

Interviewees: 1 (Marketing Department)

Executive summary

The company produces high quality kitchenware and kitchen robots for professional cooks and enthusiasts of health and whole food. They are sold through individual ways of distribution and presented to the clients on personal meetings. Topronic employs 86 people of which 50 (about 60%) is 50 years and older. All of them are women and work in direct contact with the clients.

The company has developed a conscious strategy of employment of people aged 50+. Topronic bases on the work of mid-age and older women mostly due to their communicational skills, reliability and practical experience. They are mostly more committed and responsible than younger employees. The company also highly values their life experience and practical skills which allow them for better contact with clients, as well as their loyalty and patience.

It offers also a flexible forms of employment, what is especially important in case of older workers. Topronic attempts to provide their workers with optimal conditions for professional development. Newly employed persons go through a series of initial trainings and receive supervisor, who plays a role of mentor.

1. Organisational background

Metadata:

Criteria	Parameter value
Size (employees)	- Medium (86)
Sector	- Production - Private
Work council	- No
Business volume	- 20.000.000 PLN about 5.000.000 EUR (in 2010)

Topronic was established in 1991 in Lodz. The company produces high quality kitchenware and kitchen robots for professional cooks and enthusiasts of health and whole food. The products are not offered to general distribution. The company does not have stores or brokers. It has developed individual methods of distribution in Poland and Europe. The products are presented to the clients by qualified managers at special meetings (e.g. at home, in the office or restaurant). Only such presentations can fully demonstrate the benefits and capabilities of the products. Since the beginning the mission was to promote the idea of a healthy home and healthy lifestyles. Topronic aimed to develop dialogue with the customers and build long-lasting relationships with them by offering only the best quality products.

Topronic employs (31.12.2010) 86 people, of which 1 is currently on maternity leave, 2 work on half-time basis and the rest 83 are full-time workers. From the full-time employees 72 are

women (87%) and 11 men (13%). 50 workers (about 60%) is 50 years and older – all of them are women. 25 of them is already in the preretirement age (55+). Older women work in direct contact with the clients.

In the last few years the company continuously increased its employment:

Table 1. The number of full-time employees in 2006-2010

Year	No of full time employees	Change in % comparing to previous year
2006	12	-
2007	23	92%
2008	46	100%
2009	80	74%
2010	83	4%

In the last 5 years the Topronic grew from small firm with 12 employees to a medium size company employing more than 80 people. Most of the people who joined the company in these period were females, previously unemployed. Among theme there were few disabled. The increase of employment was also a result of organizational change. Previously, Topronic has cooperated with people on the basis of cooperation contract (they were not employees of the company). Currently, the firm prefers to engage people as its employees.

There are no trade unions in the company.

2. Age management approach

Topronic is aware of the difficulties that people aged over 50 years old have at the labor market. The company calls themselves as socially responsible institution. It aims to increase the employment rate of older people living in the Lodz region. For years Topronic has attempted to build an opinion of a reliable and stable employer who provides good work environment and conducive conditions for development.

Topronic practices following measures directed to older workers:

- Employment - currently, about 60% of the staff are women 50+. The company has employed theme mostly in the last few years.
- Flexible employment forms
- Training and skills development

3. Current practice and how it has evolved

Metadata:

Criteria	Parameter value
Target groups	– All workers
Type of measure	– Job-recruitment – Training – Work and working time organisation
Social partners involved	– No information
Scope of measure	– Overarching

The company has developed a conscious strategy of employment of people aged 50+. It offers also a flexible forms of employment, what is especially important in case of older workers.

Many years of cooperation with older women has proved that they are mostly more committed and responsible than younger employees. In the direct work with clients one of their most important assets are communication skills. Mid-aged and older women have the best contact with clients of Topronic. The company also highly values their experience and practical skills, as well as their loyalty and patience. From these reasons the company decided to employ mostly women 50+.

Topronic attempts to provide their workers with optimal conditions for professional development. The basis of job satisfaction is a mutual agreement, because for years we care about maintaining a good atmosphere and friendly relations. Older workers actively participate in different events and corporate meetings.

The company provides flexible forms of employment – workers mostly chose standard work contract, however currently 10 people 50+ are employed on the basis of commission work contract. Most of older workers work at home and individually contact with the clients. They can arrange the work time to their needs and requirements.

Newly employed persons go through a series of initial trainings. They receive their supervisor, who plays a role of mentor. He meets with theme, teach and advise. The company provides regular trainings and meetings for workers. Every two weeks employees have group meetings.

The company cares also about the All workers receive also a "Fit-profit" card entitling them to discounts on a variety of health services and recreational classes (e.g. aerobics, salt caves, swimming, dance). About 50% of workers 50+ use this card at least once a week.

4. Concluding reflections from the researcher

Topronic bases on the work of mid-age and older women mostly due to their communicational skills, reliability and practical experience. They also are able to gain the trust of clients and better explain the features of products which Topronic offers. Especially in the last few years the company has significantly developed and increased employment. It engaged many new persons – many of them were previously unemployed.

Topronic is an example of a company which was able to appreciate and utilize the practical experience and knowledge, as well as communicational skills of older women. For many of them, in the unfavorable situation on the labour market, work for Topronic was a good opportunity.

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CASE 10: Company: a large, nationwide bank (Anonymous)

Longitudinal case study: ActiveAge Project

Interviewees: 1–Human Resources Director (not in the Headquarter, the same person as in the previous project)

Executive summary

The following longitudinal case study is not an example of good practice in age management. A leading, national, foreign-owned bank, during the last five years of significant growth has not implemented any age-related practices, even though they are successfully applied in its branches in the Western Europe and the bank consistently hires younger and middle-aged workers. Employees aged 50 and older constitute only two percent of the staff.

Nevertheless, the case study supports useful conclusions with reference to a more general category of companies from a highly skilled sector (and in particular service sector), established in Poland in the mid 1990s or later. Age management is still an uncommon strategy and the share of older workers is very low. One of the reasons is a negative opinion about the usefulness of education and skills gained under the socialist regime, and the potential productivity of older generations. Time, however, will slowly change both attitudes and practices towards older workers and age management should become a necessary tool for increasing the productivity of older workers.

1. Organisational background

Metadata:

Criteria	Parameter value
Size (employees)	– Big (2000)
Sector	– Services (banking) – Private
Work council	– No
Business volume	– <i>no information</i>

The sample company is a large, national foreign-owned bank that offers a wide range of investment and banking services for individual clients and companies. It has been operating in Poland since the mid 1990s. Between 2004 and 2006 there was a period of intensive investments and fast development of the company (including employment increases of 500 people a year). Today the company has almost 2,400 employees. Sixty-three percent of employees are women. The majority of personnel is young – 90% are below the age of 40, i.e.:

Age category	Percentage
< 25	16%
26-30	34%
31-40	40%
41-50	8%
> 50	2% (52 workers)
Total	<i>about 2400</i>

The majority of workers are employed as client consultants. Ten percent of employees aged 40 and above are in highly skilled, and top ranked positions with many years of experience working in the company. Many of these people work at the headquarters in Warsaw.

The bank has branches in all regions of Poland, mostly in medium-size and big cities. The average size of a branch office is seven to eight people with one director, two to three client supervisors and three to four consultants.

There are trade union in the company, however, according to the respondent, they are small and not representative (that is they play only marginal role and do not include too many employees).

2. Age management approach

According to the respondent, at present there is no need for age management programs in the company. A lack of general programs and practices toward older workers are caused simply by the fact of having solely two percent of employees aged 50 or older.

The type of work in a bank favors mainly younger people. The respondent describes the work as very demanding, fast paced and stressful. A salesman needs to like it. He/she should be energetic, resilient and creative. The fundamental measure of an employees' quality of work is simply their productivity. Once a quarter an evaluation of all employees is performed. Each worker in its group has its specific criteria of assessment (e.g. sales results). Better performances are awarded with bonuses (usually financial) or promotions.

The training system in the bank is extensive. It is focused on professional groups and the age of the worker does not play any role. Directors of branches decide which employees will be sent for particular training.

There is a group of 38 retired ex-workers at the bank. They have special free of charge health service, and can use many facilities on the same basis as normal workers, e.g. same discounts for bank accounts. They are also given occasional support, e.g. Christmas gifts.

3. Original practice

In the previous research (ActiveAge Project – 2005, company also treated as anonymous) the company, despite having a well-developed human resources policy, had no age management strategy and a very small share of older workers. After five years not much in the company has changed.

The first contact - eight years ago – was with the same person in charge of the human resources department and at that time she was very open and interested in the notion and idea of “active ageing” and “age management” and the possibilities to introduce these good foreign (from their headquarters abroad) practices in Poland.

4. Current practice, how it has evolved and expectations about the future

According to the respondent, a very young age structure is a general pattern in banking sector in Poland, especially in new banks (established in the late 1990s and 2000s) and banks with foreign capital. The situation is different only in the oldest banks (established in the early 1990s) based on public/national funds. They initially engaged many specialists from former socialist public institutions, many of whom still work today, increasing the average age

in the companies. However, new employees in the banks are usually young due to two facts. On the one hand, if a worker is needed, younger people are usually hired because it is presumed they will be more effective. On the other hand, usually only younger people apply for jobs at the bank. Contrary to the 40 and older employees, the younger employees are seen as being more mobile and more people in this age group look for a new job.

Even though the bank actually has no age management policy and older workers are in the minority, the interviewee supposes that in the future, (yet not the near future), it will have to change. In the near future, demographic changes and ageing of the labour market will not have any significant impact on functioning of the banking sector, as there will still be enough young and well-educated people who are more efficient in this type of work. Nevertheless, the bank has already experienced some problems connected to the fact of having mostly younger workers. Firstly, younger people are much more mobile and can easily change companies. Additionally, women can take maternity and parental leave. There have been examples in some local branches with very young staff that a number of events resulted in the almost simultaneous leaving of almost all of the employees.

The second problem is an important group of clients consists of older people, whereas salesmen are mostly young. It was noticed that younger bank workers sometimes do not understand well enough the needs of older clients. They do not have enough patience to explain complex issues or they use language that is incomprehensible for seniors. Older clients need someone who they can trust, who shares the same life-perspective and who can understand his or her needs, rather than someone who is the age of their grandchildren.

The banking sector in Poland has existed in a free-market economy only for the last 20 years. It still develops. This is a constant process and some barriers still have to be overcome.

5. Concluding reflections from the researcher

The provided case study certainly is not an example of good practice in age management. Nevertheless, it is a useful analysis of a longitudinal case, explaining much about the situation of the banking sector in a post-transitional country like Poland.

The bank, even though it is a large, leading company and part of an international corporation, during the last five years (in which has significantly grown) it has not implemented age-related practices even though it has successfully applied these practices in its branches in Western Europe) and consistently hires younger and middle-aged workers. This leads to few more general conclusions.

First of all, age management is still uncommon in private companies requiring highly skilled workers (in service sector), established and developed in a transitional or post-transitional free market economy. The lack of practices is not a case of the lack of knowledge, as even in a company that operates in the West is commonly considered to have as good practice, age management policies. However, in Poland it does not implement any of the solutions which bring profits in other countries.

Secondly, older generations in Poland are still considered less educated and less efficient/productive. It seems that time will slowly equalize the differences caused by the transition from a socialist to free-market economy. Even the relatively young employees of the banking sector will age. The changes in the labour market will force a change in recruitment strategy. Additionally, the requirements of the ageing market (and growing share

and value of older clients) will require older staff. In such productivity-oriented companies, age management should be a necessity for increasing the efficiency of older workers.

Contact details:

No agreement for publishing contact details