



Ewa JASTRZĘBSKA • Paulina LEGUTKO-KOBUS

INITIATIVES FOR PEOPLE AGED 50+ IMPLEMENTED BY MUNICIPALITIES AND ENTERPRISES IN THE OPOLE SPECIAL DEMOGRAPHIC ZONE

Ewa **Jastrzębska**, PhD (ORCID 0000-0002-0029-6943) – *Warsaw School of Economics*
Paulina **Legutko-Kobus**, PhD – *Warsaw School of Economics*

Correspondence address:

Niepodległości Avenue 162, Warsaw, 02-554, Poland

e-mail: plegut@sgh.waw.pl

ABSTRACT: The article addresses an innovative instrument of regional development management, namely the Special Demographic Zone (SDZ). The zone has been established in Opolskie Voivodeship, a region marked by the most unfavourable demographic trends among other Polish regions. The article aims to highlight activities intended for people aged 50+ pursued by municipalities and enterprises operating within the SDZ as well as discussing the assessment the Opolskie for the Family programme by surveyed stakeholders. Based on the theoretical framework of the SDZ, a questionnaire has been designed, and a survey has been carried out with a view to achieving the aforesaid aim. Based on the analysis of survey results, the authors have identified the need for and scope of further action that will allow local self-governments and enterprises to implement the concept of the SDZ in a more effective manner.

KEY WORDS: Opolskie Voivodeship, people aged 50+, special demographic zone, enterprises, municipalities

Introduction

Social phenomena, including a demographic shift (attributed to the ageing of the population and depopulation of some areas of the European Union), are ranked among the barriers that will shape the visions of the future and EU development strategies (EU, 2014). The territorial distribution of demography-related barriers to development is uneven – some areas or regions, depending on their characteristics, are likely to face these barriers to a lesser extent or at a later time; however, there is no doubt that their results will affect the entire EU. Demographic forecasts until 2060 reveal profound changes in the age structure of the EU population (they will mirror the fertility, life expectancy, and migration figures). The European society of 2060 will be not only older but also unevenly distributed (the differences will be visible between and across states and regions) (EU, 2017).

As regards Poland, the region with the most challenging demographic situation is Opolskie Voivodeship. According to a forecast of the Central Statistical Office, by 2035 the population of the region will have dropped by over 15%, with a faster decline in urban areas (Dybowska, 2016, p. 240). What affects this highly unfavourable demographic condition of the region is: the birth rate in Opolskie Voivodeship at -3.4 (-1.3 for Poland), the region's net migration rate of -4.4 (-0.4 for Poland) (Szczygielski, 2015, p. 65). An extra challenge for the region's development strategy is the age structure of the population. In 2015 the number of people aged 50 and over was 38.4% (Poland's average 36.5%), which is up by 5.4 pp compared with 2007 (Urząd Marszałkowski Województwa Opolskiego, 2016, p. 9).

Given the above indicators, as well as general global and European socio-demographic trends, the development strategy of Opolskie Voivodeship focuses on demographic issues, especially accommodating the needs of 50+ people. With this end in view, the Opolskie for the Family: a Special Demographic Zone Programme for Opolskie Voivodeship until 2020 was adopted by the Resolution of the Executive Board of Opolskie Voivodeship on 16 September 2014. The programme is one of the tools adopted to further the implementation of the Opolskie Voivodeship Development Strategy until 2020, which prioritises the prevention and counteracting of depopulation as a horizontal development challenge (Urząd Marszałkowski Województwa Opolskiego, 2012, pp. 81-82, 130, 132). The programme contains four thematic packages corresponding to priority impact areas. One of them, Golden Autumn, is intended for people aged 50+ and promotes the development of favourable living conditions for elderly people and helps tap their potential for region's development.

This article aims to identify and analyse (based on completed questionnaires) initiatives for people aged 50+ launched by municipalities and enterprises as well as assessing the awareness and implementation of the programme by the stakeholders. The article is based on the analysis of source materials (literature, strategic documents, reports) and the results of an original online survey.

An overview of literature

The Special Demographic Zone programme is a pilot initiative both Poland – and EU-wide. It embraces holistic and innovative tools implemented at the regional (voivodship) level and serving, on the one hand, the counteraction and, on the other, adaptation to unfavourable demographic changes (Urząd Marszałkowski Województwa Opolskiego, 2014, p. 11).

Searching scientific databases for the key word of “special demographic zone” only returns several hits. Foreign literature on the subject lacks references to similar solutions implemented in other countries. However, an initiative by the German government is worth mentioning as discussed by Klimczuk (2015, pp. 32-36). In 2005 the state of North Rhine-Westphalia proposed the establishment of a network organization, SEN@ER – Silver Economy Network of European Regions, rested on similar assumptions and pursuing similar goals as the Golden Autumn package. The literature on the subject also reveals some attempts to incorporate demographic challenges and activation initiatives for people 50+ (and, more broadly, the promotion of the silver economy) in the local strategies of Łódzkie, Małopolskie and Pomorskie Voivodeships (Martinez-Fernandez et al., 2013, pp. 95-116).

The authors of several articles covering the SDZ focus primarily on highlighting the demographic situation (including demographic issues as development barriers) of Opolskie Voivodeship and the framework of the Opolskie for the Family programme (Rauziński, Szczygielski, 2014; Goleński, 2015), also exposing the EU (Gerejczyk, Pilewicz, 2017) and global demographic trends (Szczygielski, 2015) or assessing activities intended to seniors as one of the programme packages (Wawrzyniak, 2015). When assessing the Opolskie for the Family programme, Gerejczyk and Pilewicz (2017) highlight the SDZ as a special case of regional strategy well-aligned with their theoretical model of local and regional strategies addressing demographic challenges. None of the above studies covers the assessment of awareness and implementation of the SDZ programme.

Research methods

A study of initiatives undertaken by local self-governments (municipalities) and enterprises operating in the SDZ for people aged 50+ was carried out in liaison with the Marshal's Office of Opolskie Voivodeship in the period from December 2017 to January 2018. An anonymous online survey was submitted to all local self-governments of the voivodeship (71 municipalities and one city with district (Pol. powiat) rights) and 25 business support institutions, 45 beneficiaries of the Managing Authority of the Regional Operational Programme Opolskie Voivodeship 2014-2020 (Measures 7.4, 8.1 and 8.2) and 17 beneficiaries of the Intermediate Body (the Opole Centre for Economic Development or OCED).

The survey was completed by 40 municipalities and 12 enterprises. Among the municipalities, there were two urban municipalities (out of three in the Opole region), 18 urban-rural municipalities (out of 33) and 20 rural municipalities (out of 35). The research conducted among the municipalities confirms that demographic issues (especially a decline in population) are among the most urgent development problems. Over the last 5 years, out of 40 surveyed municipalities, only two reported an increase in the number of inhabitants, while as many as 18 reported a significant decrease. This condition makes the municipalities aware and galvanise them to design policies of competitiveness, such as: rehabilitation and creation of attractive public spaces as meeting points (18 municipalities), infrastructure and senior-friendly services (14 municipalities) and the development of social (and intergenerational) integration facilities (10 municipalities).

Among the 12 surveyed enterprises, there were 8 micro (0-9 employees) and 4 small businesses (10-49 employees). Ten of them were private businesses with the Polish capital (100%) headquartered in Opolskie Voivodeship (five outside the city of Opole). The surveyed businesses represented commercial, service and care industry (three indications each), as well as the health care and rehabilitation and medical segment (two indications each). The surveyed enterprises were mainly operating in Opolskie Voivodeship (11), and most had been on the market for less than 15 years (eight).

Results of the research

Moving on to the discussion of the results of original research, it should be noted that they will address the following matters: 1) who (what entities) should take action for the inclusion of seniors, 2) what initiatives are implemented for people aged 50+, 3) the level of awareness of the implementation

of the Opolskie for the Family programme, 4) assessment of the programme and identification of the leaders.

The surveyed municipalities all pointed to the state as an entity that should take action for the inclusion of seniors (40 responded “definitely yes” and “rather yes”, including 30 with “definitely yes”). As many as 38 of the surveyed municipalities indicated that they should be responsible for such initiatives themselves (15 responded “definitely yes”), and their main partner should be non-governmental organisations (38 indications, including 13 for “definitely yes”) and 50+ people (35 responses, including 14 for “definitely yes”). The Church and religious associations seem to play a minor role in such action (28 indications, including 9 for “definitely yes”). In the opinion of the surveyed municipalities, entities that should get involved in initiatives for the inclusion of the elderly to the smallest extent are enterprises (15 municipalities were positive: “definitely yes” and “rather yes”, among them only three for “definitely yes”; however, most returned answers – as many as nine – were “no”).

All of the surveyed businesses agreed that action for the inclusion of seniors should be taken first of all by local self-government units (12 positive answers for “definitely yes” and “rather yes”) and the state (11 positive answers, including as many as seven for “definitely yes”). Other (but of secondary importance) entities that should assume responsibility for such activities and named by enterprises were non-governmental organisations, private companies, and 50+ people themselves (nine positive answers each). The Church and religious associations were, in the enterprises’ opinion, the least expected to get engaged in such initiatives (six answers for “yes” and as many as five for “no”).

For the sake of the research analysis, initiatives for people aged 50+ are divided into the following categories: 1) improvement in the quality of products and services for seniors, 2) improved availability of products and services for seniors, 3) activation of seniors, 4) improvement in digital competence of seniors, 5) age management (age management underlines employee age diversity as an important factor in the development of an organisation).

The surveyed municipalities were primarily active in the following areas:

- activation of seniors – 31 municipalities (this category covers the following activities: organisation of social events for/with the participation of seniors, practical classes aligned with interests/hobbies of 50+ people, supporting Senior Clubs, general and specialised courses and training for seniors, supporting the development of Third Age Universities, promotion of a healthy lifestyle, tailor-made educational projects and activities related to disease prevention and health education; one response pointed to the idea of time bank as a method of activation of the elderly),

- development of digital competences among seniors – 26 indications (mainly through: computer, software and application training and the set-up of Internet cafés),
- improvement in the accessibility of products and services for seniors (above all, the initiatives of: cooperation with various entities for solving seniors' problems, price reductions for seniors, adaptation of the municipal website to seniors' needs) and improvement in the quality of products and services for seniors (understood as the enhancement of existing services to accommodate the needs of the elderly) – 20 and 19 responses, respectively.

The least popular initiatives reported by the surveyed municipalities were related to age management – only five indications – primarily consisting in maintaining employment of seniors who wish to keep working.

The 12 surveyed businesses mainly take action aimed at activating seniors (seven indications), improving the quality and availability of products and services for seniors (six indications each); less frequently, they are involved in initiatives developing seniors' digital competence (three) or age management programmes within their organisation (two) – figure 1. In this question, three enterprises declared that they were not taking any action for seniors, so they failed to continue the survey.

As regards the initiatives for the activation of seniors, the surveyed businesses most often reported the following: promotion of a healthy lifestyle among 50+ people, support for the establishment and operation of social integration facilities for seniors, general and specialised courses and training for seniors, promotion of disease prevention and health education among 50+ people and organisation of social events for/with the participation of seniors. With regard to the improvement of quality of products and services for seniors, the surveyed enterprises, and municipalities alike, admitted to improving mainly existing services with a view to satisfying seniors' needs. However, when improving the availability of products and services for seniors, the businesses mainly decided to introduce new technologies/products/services intended for seniors and (again like municipalities) cooperation with various entities working towards solving older people's problems. Less often did they point to the improvement of the quality of services for the elderly. Speaking of initiatives aimed to raise seniors' digital competence, the surveyed enterprises mostly pointed to courses and training in the use of computer, software and applications (just like municipalities). As part of age management, the surveyed businesses most often pointed to continued employment of seniors who want to keep working, on top of company events integrating all generations of employees.

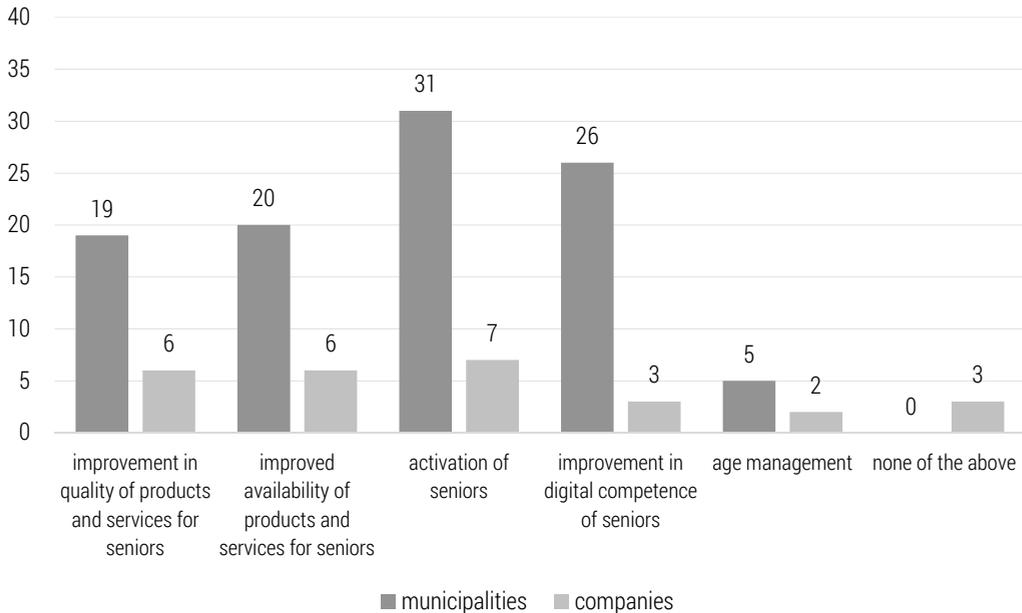


Figure 1. Initiatives implemented by municipalities and enterprises operating in the SDZ for people aged 50+

Source: author's own work based on completed surveys.

As regards the awareness of the implementation of the Opolskie for the Family programme, the research done among the municipalities returns interesting results. Among 40 of the surveyed municipalities, 11 declared that their action resulted directly from the programme; at the same time, as many as 15 indicated that their initiatives for seniors were not related to the Opolskie for the Family programme; 14 did not have an opinion on the matter and responded, "don't know."

Among the nine businesses questioned in the successive section of the survey (excluding three that did not take any action for seniors), four declared that their initiatives came from the Opolskie for the Family programme; the same number of enterprises gave the opposite answer, and one did not have an opinion on the matter – figure 2.

The assessment of the Opolskie for the Family programme by the questioned municipalities was positive – 21 rated it "very good" (2) or "good" (19); obviously, the assessment of the programme was very strongly linked to the awareness of the initiative. 15 municipalities did not know how to measure the programme, and four admitted that they did not know it. It is positive that no municipality responded "bad" or "very bad."

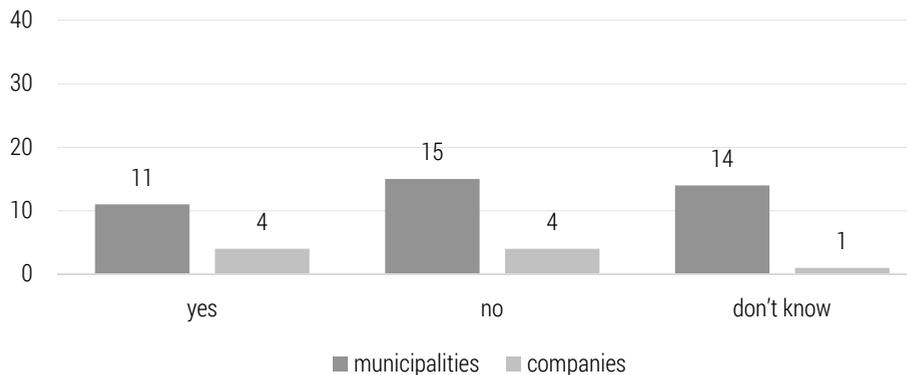


Figure 2. Awareness of the implementation of the Opolskie for the Family programme by municipalities and enterprises operating in the SDZ

Source: author's own work based on completed surveys.

The surveyed enterprises were mostly positive about the Opolskie for the Family programme (four answers “good” and two “very good;” no negative answers were given). Only two enterprises were unable to assess the programme, and one did not know it – figure 3.

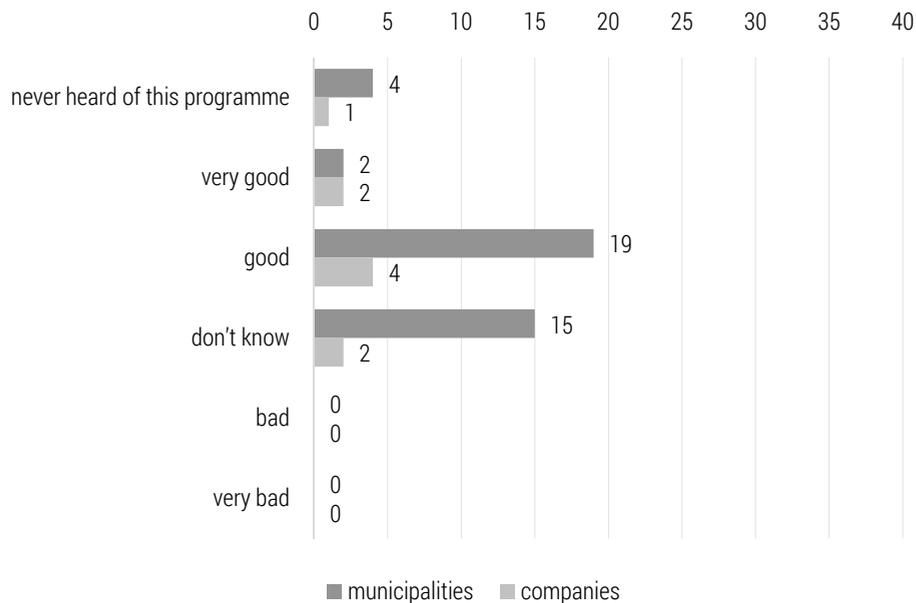


Figure 3. Assessment of the Opolskie for the Family programme by municipalities and enterprises operating in the SDZ

Source: author's own work based on completed surveys.

With regard to the effectiveness of action intended for the elderly in the region, the surveyed municipalities pointed to the initiatives by the Marshal's Office of Opolskie Voivodeship (the average ranking position for four possible positions in the question was two in this case), followed by NGOs and local self-governments (position 2.18). Businesses received the poorest assessment (position 3.65).

In the opinion of nine of the surveyed enterprises, the most effective action for seniors in the region is taken by local self-governments (the average ranking position was 2.11), followed by the Marshal's Office and NGOs (the same position 2.44) and businesses (position 3.0).

As for the leaders of activities for seniors, eight of the surveyed municipalities pointed to individual local self-governments, among them: Opole, Kluczbork, Gogolin (two indications) and Kędzierzyn Koźle and Prudnik (one indication each).

However, none of the nine surveyed enterprises were able to point to a company from the Opole region which could be considered a leader in activities for people aged 50+.

Conclusions

Through the initiative of the Special Demographic Zone, Opolskie Voivodeship attempts to respond to the demographic challenges of the region. The pilot programme, Opolskie for the Family, encompasses a number of integrated activities addressing: the labour market, improvement of the standard of living in the region, and broadly understood activation. A large part of these activities (mainly regarding the promotion of professional, physical, cultural, and educational activity) is intended for people aged 50+.

Already at the stage of programme development (based on the expert-social method), it was emphasized that its implementation would require cooperation and commitment of various stakeholders, including businesses and local self-governments (Urząd Marszałkowski Województwa Opolskiego, 2014, pp. 35, 38). As demonstrated in the completed research, both the surveyed municipalities and enterprises undertake many activities for people aged 50+, however, it is not possible to assess unambiguously whether it is the result of conscious implementation of the programme. This situation is the outcome of insufficient familiarity with the programme, both of municipalities and enterprises. As demonstrated by the research, the programme-related services are better known than the programme itself: Opole Family and Senior Card, Opole Senior Card or Regional Opole Senior Service Cluster.

The research also revealed that the surveyed municipalities and businesses do not see each other as natural partners implementing/undertaking activities benefiting people aged 50+ (in the opinion of municipalities, enterprises are the least likely to implement initiatives for the benefit of seniors). Meanwhile, according to the research, both municipalities and enterprises take the same types of action for the benefit of seniors.

Given the results of the conducted survey, we recommend further research of the effectiveness of the programme, including, in particular, activities carried out through intersectoral cooperation. It is necessary to identify best practice in this respect that may be employed not only by local self-governments and enterprises from the Opole region. This is also relevant in the light of the Opinion of the European Committee of the Regions (EU, 2017) which reads that the current EU's response to demographic challenges is limited and poorly developed, while regions and cities should perceive the demographic change not only as a barrier but as a development opportunity related to the silver economy.

Further research should be carried out and more effort should also be taken to promote the awareness of the programme and the knowledge of its framework, especially among local self-governments, and the need for conscious participation of both local self-governments and enterprises in the implementation of programme's objectives.

The contribution of the authors

Ewa Jastrzębska – 50%.

Paulina Legutko-Kobus – 50%.

Literature

- Dybowska J. (2016), *Ludność na obszarach wiejskich województwa opolskiego – przeszłość i perspektywy demograficzne*, „Studia Obszarów Wiejskich” Vol. 41, pp. 229-244, DOI: <http://dx.doi.org/10.7163/SOW.41.15>
- EU (2014), *Making Europe Open and Polycentric. Vision and Scenarios for the European Territory towards 2050*, ESPON Report, Luxembourg
- EU (2017), *Opinia Europejskiego Komitetu Regionów – Reakcja UE na wyzwania demograficzne*, Dziennik Urzędowy Unii Europejskiej, 2017/C 017/08
- Gerejczyk K., Pilewicz T. (2017), *Special Demographic Zone in Poland – in search for the gist of the phenomenon*, “Journal of Economics and Management” Vol. 29(3), pp. 37-57, DOI: 10.22367/jem.2017.29.03
- Goleński W. (2015), *Project of a special demographic zone as a response to a threat of depopulation in the Opole province*, “Zeszyty Naukowe Wyższej Szkoły Oficerskiej

- Wojsk Lądowych im. gen. T. Kościuszki” No. 4, pp. 48-63, DOI: 10.5604/17318157.1200167
- Klimczuk A. (2015), *Regional Development in an Ageing Society: Overview of Selected Foreign and Polish Recommendations and Practices*, in: Chudý Š., Tomczyk Ł. (eds), *Aktywna starość w perspektywie społeczno-kulturowo-edukacyjnej*, Kraków, pp. 21-50, DOI: 10.13140/RG.2.1.2353.8402
- Martinez-Fernandez C. et al. (2013), *Demographic Transition and an Ageing Society: Implications for Local Labour Markets in Poland*, Local Economic and Employment Development (LEED) Working Papers, No. 8, Paris, DOI: <http://dx.doi.org/10.1787/5k47xj1js027-en>
- Rauziński R., Szczygielski K. (2014), *Związki polityki ludnościowej z polityką społeczną na przykładzie koncepcji Specjalnej Strefy Demograficznej w województwie opolskim*, „Problemy Polityki Społecznej. Studia i Dyskusje” No. 27(4), pp. 161-173
- Szczygielski K. (2015), *Opolska Specjalna Strefa Demograficzna – kaprys czy konieczność?*, „Studia Ekonomiczne. Zeszyty Naukowe Uniwersytetu Ekonomicznego w Katowicach” No. 223, pp. 57-72
- Urząd Marszałkowski Województwa Opolskiego (2012), *Strategia Rozwoju Województwa Opolskiego do 2020 r.*, Opole
- Urząd Marszałkowski Województwa Opolskiego (2014), *Program Specjalnej Strefy Demograficznej w województwie opolskim do 2020 roku „Opolskie dla Rodziny”*, Opole
- Urząd Marszałkowski Województwa Opolskiego (2016), *Analiza sytuacji społeczno-ekonomicznej województwa opolskiego w obszarach oddziaływania Europejskiego Funduszu Społecznego*, Opole
- Wawrzyniak J.K. (2015), *Specjalna Strefa Demograficzna obszarem dobrych praktyk na rzecz seniorów. Założenia i realizacja programu*, „Rocznik Andragogiczny” Vol. 22, pp. 341-353, DOI: <http://dx.doi.org/10.12775/RA.2015.021>