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## **The social and educational capital of senior citizens' development in Poland and in Europe**

### **Spółeczny i edukacyjny kapitał rozwoju seniorów w Polsce i w Europie**

**Summary:** The ageing of European societies ensues, above all, from adverse demographic trends; it also becomes a cause of many disturbing phenomena involving marginalization, decreased social participation, professional and educational activity. There is increasing concern about the need to create a social capital for development. This paper will present data in regard to the situation of senior citizens in Poland and Europe. The material is based on the reports published by the European Committee and country strategy papers.

**Keywords:** education, seniors, society, social participation

**Streszczenie:** Starzenie się społeczeństw europejskich jest przede wszystkim skutkiem niekorzystnych tendencji demograficznych, ale staje się też przyczyną wielu niepokojących zjawisk dotyczących marginalizacji, obniżenia partycypacji społecznej, aktywności zawodowej i edukacyjnej. Coraz częściej słychać głosy o konieczności kształtowania społecznego kapitału rozwoju. W tekście zostaną przybliżone dane na temat sytuacji seniorów w Polsce i w Europie. Materiał opiera się na raportach opracowanych przez Komisję Europejską oraz krajowych dokumentach strategicznych.

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**Słowa kluczowe:** edukacja, seniorzy, społeczeństwo, uczestnictwo w życiu społecznym.

### Introduction

In the theory of care, old age is referred to as the involution period (Dąbrowski, 2006, p. 107). It starts with the cessation of professional activity, that is, the beginning of retirement age; the human ability to independently satisfy one's own needs is gradually increasing, the extent of care increases compared to the extent of independence and assistance activity and the area of being dependent on others is broadening. This period ends with old senility and, consequently, death. According to M. Jarosz, „old age is a process of progressive impairment of the organism, associated by various dysfunctions, such as the loss of the ability to adapt to environmental changes or the increased likelihood of death. It is the period when the life independence becomes limited, and one's dependence on the environment increases. It has to be stressed as well that ageing is a physiological process, progressing at a different rate in different people. This process is conditioned both environmentally and genetically. Whereas old age is determined according to chronologic or biological age and is closely related to the number of ages survived by a given human. Thus, it sounds ambiguous to say that someone is in old age” (Jarosz, 2008, pp. 9-10).

However, since we use such words as elderly person, old person, aged person, person of a certain age, let us see who we actually talk about. We should examine, therefore, the age category of old age. R.J. Havighurst (1981) divides the human life into the following periods:

- Infancy and early childhood (0-6 years)
- Middle childhood (6-12 years)
- Adolescence (12-18 years)
- Early adulthood (18-35 years)
- Middle age (35-60 years)
- Late maturity (above 60 years) (Tyszkowa, 1997, pp. 952-953).

The World Health Organization (WHO) uses the following breakdown regarding the age of senior people:

- an „elderly” person (advanced age, so-called young-old) means 60-74 years,
- an „old” person (frail age, so-called old-old) 75-89 years, and
- a „very old” person (so-called longevous) means 90 years or more (Jarosz, 2008, pp. 9-10).

One may also assume the division of old age according to Polish demographers, adduced by Z. Dąbrowski:

- Stage I – 60-69 years
- Stage II – 70-74 years
- Stage III – 75-84 years
- Stage IV – above 85 years (Dąbrowski, 2006, p. 106).

What is stressed everywhere, regardless of the adopted nomenclature, that 60 years is the threshold of the old age. In Havighurst, there is virtually no further distinction. He gives the old age the beautiful name of late maturity. The age of 60 years, however, defined in the above distinctions, seems to be slightly artificial. Why 60 years, and not 62 or 72? These categories are mostly used for the purposes of formal organization, and they are of little consequence in terms of human health and activity, or lifestyle. The rule is, you have as many years as you feel. It was reportedly Aleksander Kamiński who said that if a man liked to read books or do some sport for his whole life, he would do so still in his old age. And that someone who was a home body and did not like to move, led an unhealthy lifestyle, or was passive in his life and society, would remain so as well. Thus, it is not the most important thing how old we are, but rather what our habits, interests, passions, and lifestyle are: what we like, and what we dislike and try to avoid. Among young people we may often find very active individuals, interested with everything that happens around them, and eager to discover the people and the world. We may also meet those who do not like changes and feel best among a small circle of friends.

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### About (not) ageing

O. Czerniawska defines the state of old age using the definition coined by J. Piotrowski: “Old age is a cultural phenomenon occurring for biological reasons related to the weakening of strength (involution). There is no objective or natural threshold of the old age; the connection between the onset of the old age with chronologic age (60, 65, or 55 years) is purely conventional and has become widespread along with the social security system” (Czerniawska, 2007, p. 441). This is, potentially, in accord with the thesis that defining the threshold of the old age is somewhat artificial. It seems that the state of the old age is a very general and poorly identified notion, in terms of biology, life, as well as society and culture. The old age is changing. It is difficult to find today a uniform and authoritative statement describing the notion of the old age. We wonder if the old age is just biological age or rather a state of mind, a mood level, a stage in life, or the subsequent period of life activity. Let us seek answers in the biographies sketched by the people interviewed by M. Redzisz in her report published in a supplement to *Gazeta Wyborcza* (Redzisz, 2012, pp. 6--9):

„Fifteen years ago I became an extra. I had to earn some extra money, as people stopped having their clothes sewed. I never need a double when I play a scene! Maybe I should become an actress? (...) I read a lot. About ancient history, religion, philosophy, and space.”

Anna Maria, 70 years

„I’m a translator of French literature and editor, I worked for a publishing house for 30 years, in a Romance literature editors’ office. I’m working at home. (..) Now, I have to plan my work myself and everything is coming apart: the cat wants to go to the balcony, someone calls, or there is something interesting in the TV.”

Maria, 70 years

„I still have a fit body, in spite of my age. I’m dancing in a show at the National Theatre. I’m an actor, a director, a teacher, I used to be a director of a theatre, but if was given any particular talent by Got, it has

always expressed itself in dance. (...) I passed the casting to *Ojciec Mateusz*, but when they learned by age, I was out! So I don't advertise it.”

Zbigniew, 978 months

„I'm DJ Vika. Each year, I handle a New Year's Eve for 200 seniors, I play music by myself until 6 a.m.! I always begin with a waltz, *The Blue Danube* or *On the Hills of Manchuria*. Then I speed up! I love Modern Talking! I'm hire-purchasing my own console now.”

Wika, 74 years

„I'm an example that the age barrier can be beaten. How do I do it? I take the life in with all senses. I seek enclaves of focus for myself in this crazy world. At present, I take part in a pantomime workshop at the Stefan Niedziałkowski school. I performed an improvisation recently: contemplation with the body's energy.”

Jerzy, 85 years

### **Is the old age a difficult task in life?**

The statements presented above very clearly show that the old age in the modern world can have many unusual facets. It does not have to be lonely and needless, passive and pushed aside. O. Czerniawska is right to stress that “there is no such thing as one style of ageing and adjusting to the old age” (Czerniawska, 2007, p. 441). The issue of adapting to the old age has always existed. The key question was not whether to grow old or not. It has always been how to grow old. What is also important is if we have the appropriate conditions to age. It was underlined by R.J. Havighurst (1981) in his description of developmental tasks of later maturity:

1. Adjusting to decreasing physical strength and health.
2. Adjusting to retirement.
3. Adjusting to the death of a spouse.
4. Establishing a clear affiliation with one's age group.
5. Meeting and adjusting one's social roles in a flexible way.
6. Establishing satisfactory living arrangements (Tyszkowa, 1997, p. 953).

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Since these tasks were defined more than 30 years ago, they are becoming slightly outdated. Now, in the early 21st century, can we discuss the first task from the above list? Will failing to fulfil one of these tasks result in unhappiness or social disapproval? One does not have that impression when reading what the heroes of the quoted report said. The cultural and mental transformations in modern societies lead to the conclusion that tasks, related in particular to fulfilling social roles and the needs of acceptance and affiliation, do not have to nor should be the cause of seniors' dilemmas. Most certainly, the living and health needs of the elderly also evolve. The civilization and technological leap enables to fulfil them more easily and efficiently than it was possible 50 or 100 years ago.

The underlying issue, however, seems to be something else. A growing number of people cross the threshold of early old age, and more and more of them achieve longevous age. An increasing number of people require social and economic concern of the state. Another fact is the increase in the expectations of older people regarding the range of activities offered to them by cultural and educational institutions.

### **Old age as a social and economic problem**

The demographers already began to deal with the issue of quick ageing of societies some time ago. In many countries, this phenomenon is considered a social and economic threat. According to I. Stuart-Hamilton, the "ageing is not a determinant of the modern times, yet it was only in the last century that it became common. It is estimated that in pre-historical times old age was a rarity, and even as late as in XVII century only 1% of the population lived beyond 65 years. In 19th century, this number increased to 4%. Today, about 70% of the current Western population reaches the age of 65, and 30-40% live beyond 80" (Stuart-Hamilton, 2006, p. 13). The ageing of society was dramatically intensified in the 2nd half of the 20th century. Many factors contributed to this occurrence, to name only the most important ones: decreased number of births, decreased number of deaths, and the demographic make-up of migrants. The first of the listed factors, the decrease in the number of births, is related to the changes in the family structure model. People rarely want to have a family with many children, and women decide to give birth at and increasingly older age, thus increasing

the number of elderly people in the society. The second factor is the decreased number of deaths. This results from the development of healthcare, increased hygiene, immunizing the organism, mostly through vaccination, as well as the changes in the lifestyle and nutrition. The third factor is related to migration in the areas where, for instance, young people have moved looking for work, or conversely it was migrants in advanced age who arrived (Czekanowski, 2012, pp. 21-26).

According to the data gathered by M. Jarosz, „the oldest population of the world currently inhabit Europe, and amount to about 20%. The EU countries with the highest level of demographic old age are, in current listings, Spain, Greece, Germany, and Italy. The situation is similar in Belgium, Ireland, and the Netherlands. Whereas the situation is most favourable in Denmark and Luxembourg” (Jarosz, 2008, p. 13).

In another publication, its authors follow the UN in their classification of societies, distinguishing three levels of ageing:

- „A young society – the percentage of people aged 65 years and above does not exceed 4%,
- A mature society – this percentage is between 4% and 7%
- An old society – the percentage is above 7%.”

These same authors also present the division by E. Rosset, a Polish demographer, who described four stages of ageing of a society:

- „stage 1 – demographic youth (8% of population aged at least 60 years)
- stage 2 – the foreground of the old age (between 8% and 10% of older people)
- stage 3 – the proper foreground of the old age (10%-12%)
- stage 4 – demographic old age (more than 12% of population exceed the age of 60 years)” (Szatur-Jaworska, et al., 2006, pp. 57-58).

The survey prognosis for the population of Poland shows there will be 9.5 million people aged 60 years and above in 2020, which will make up 24%. Whereas by 2030, their number will have exceeded 10 million, or 27%. This is connected to the particular attention to the changes in the social policy of Poland towards people of the third and fourth age.

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According to the research carried out by the UN Population Division, in 2005-2050 the population of Poland will decrease, regardless of other predictions. In the most optimistic scenario for our country, once the increase in fertility has occurred, the population of Poland will amount to 36.63 million people. However, if the increase in births does not take place, the number of Poles will be 29.64 million people (Zboina & Nowak-Starz, 2009, p. 18).

In M. Jarosz, we can find information on the age distribution in Poland. The most longevous regions in Poland are Subcarpathia, Podlachia, and Lesser Poland. In Subcarpathia, the average life expectancy is now 72.6 and 80.8 years for men and women, respectively. The inhabitants of these regions claim that they owe their longevity to favourable climate and environmental conditions, as well as a hygienic lifestyle. Whereas, according to research, the inhabitants of Łódź and its surroundings live the shortest. The average life expectancy for men and women amounts to 68.5 and 78.6 years, respectively. The cause of this may be traced to the environmental pollution caused by the textile industry in the area (Jarosz, 2008, p. 21). Together with the increase in average life expectancy in Poland, the number of the so-called centenarians also increased. These are people who reached or exceeded the age of 100 years. There are about 1500 centenarians living in Poland. This is less than a half than elsewhere in the world, with one centenarian per 10-15 thousand citizens. To compare, according to statistics, in the 1970s there were about 500 people of this age. According to the prognoses of the Central Statistical Office of Poland, there will be 9 thousand of them by 2030 (Jarosz, 2008, p. 23). In words of Z. Nowak, „the globalization of aging of the world population is a harbinger of serious adverse changes for:

- the state (including the deepening of the gap between the incomes and pension benefit expenses, budget instability),
- the economy (in particular, the narrowing of the work and consumer markets, higher labour costs),
- the individual (especially the decrease in pension benefits, increased own contribution to the guaranteed social security),
- the family (e.g. increased burden of taxation, taking over the care of the oldest generation)” (Woźniak, 2003, p. 14).

### **The social capital of development in Poland and Europe**

A disturbing situation which has become to concern not only politicians but also economists and sociologists is the level of intellectual capital in Polish society. Intellectual capital is the combination of four other capitals: human (life experience, education, attitudes, skills), structural (educational, scientific and research institution, IT infrastructure), social (the norms of conduct, trust, and involvement, promoting cooperation and exchange of knowledge), and relational (the level of investment in economic growth). The intellectual capital index for Polish seniors is estimated to be very low. Compared to Europe, Poland is ranked last among 16 countries. Why is it so? The authors of the *2008 Report on the Intellectual Capital of Poland* describe the following determinants:

- low level of professional activity among Polish seniors: the employment of people aged 55-64 years and 1.5 times lower in Poland than in the EU,
- high alienation level among the elderly: passivity in social life, educational marginality (only 16.2% of people aged 55-64 years use various forms of gaining knowledge; data for 2007),
- low accessibility of healthcare services, calculated as the number of physicians per 1000 inhabitants; the life expectancy of 60-years-old Poles is lower than in the EU (women by 2 years, men by 3 years) (Zespół Doradców Strategicznych Prezesa Rady Ministrów, 2008, pp. 122-131).

To refer to the social capital for development mentioned in the title and to the necessity of focusing the actions and concepts on its creation, it is necessary to adduce several other remarks on the social activity of Polish seniors. The data from the above report indicate that the „potential of living knowledge, values, and social skills of people aged 50+ is only scarcely used by the family, local community, and the whole society. Polish citizens above 50 years of age only marginally engage in voluntary activity and are reluctant to involve themselves in activities for their local community, sport, or culture. Their social involvement is two or three times lower than in the countries of Western Europe, and is usually limited to their closest relatives. (...) Seniors fulfil important

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economic functions in their families, providing care services or helping in tending a household. (...) Compared to other countries, Polish seniors relatively often declare devoting their time to their family, although it concerns only 30% of participants” (Zespół Doradców Strategicznych Prezesa Rady Ministrów, 2008, p. 126).

Zbigniew Woźniak points out that „active, positive ageing requires a favourable social and institutional environment, and the ability to create the potential for successful old age throughout the life, capital, as well as the adjustment of the family, local community, and broader groups to demographic changes, especially those caused by the inversion of the family pyramid (more grandparents than grandchildren). In this problem context, the world’s expert groups (for instance, the World Bank, which in 1999 launched a crusade against ageing and its effects) pointed out at the turn of the century that living in the ageing world requires the following:

- recognizing senior citizens as a valuable part of social resources,
- scientifically supported strategies to oppose myths and stereotypes about ageing and old age,
- allowing the elderly people to remain active participants of development process (including space on the work market),
- providing the members of the oldest generation with appropriate health care and health promotion activities,
- creating the conditions for and promoting permanent education,
- promoting intergenerational solidarity,
- building a national and local infrastructure to support the policy towards ageing and senior citizens, and introducing programs addressed to older people (implementing the assumptions and recommendations of the UN and its agendas)” (Woźniak, 2003, p. 16).

Similar conclusions and recommendations can be found in the 2010 communication of the European Commission *EUROPA 2020 – Strategy for intelligent and sustainable development supporting social inclusion*. This document stresses the importance of preventing social exclusion among the senior population. It can be achieved by prolonging the professional activity of elderly people, supporting the opportunities to retrain and gain new skills, learning throughout the life, in short,

quickly and adequately reacting to changes on the world market involving training and qualifications. Much is being said as well about protecting the health of elderly people (European Commission, 2010). Polish political strategists and economists included their proposals of adjustive actions in the publication *POLSKA 2030: Trzecia fala nowoczesności* [POLAND 2030: The 3rd wave of modernity]. It is a civilization project oriented towards the future, meant to improve the quality of life in Poland. The authors construe the notion of „quality of life” comprehensively, as „welfare in various areas of life, that is:

- general life expectancy,
- health expectancy (which is related to the improvement of health as the purpose of a well-functioning health care system),
- greater satisfaction with work,
- better conditions for combining one’s professional career with private and family life,
- efficient social security framework, oriented towards help, the purpose of which is to improve the chances of social and professional activity, and which cares to prevent various forms of exclusion,
- availability of public goods and services (defined, standardized, and efficiently delivered) regardless of family status and place of residence,
- open conditions of participation in public life,
- security of income in the old age,
- environmental balance regarding habitat conditions, natural surroundings and food,
- participation in culture (which is important for the pro-development creativity potential),
- satisfaction with life” (Boni, M.(ed.), 2011, pp. 30-31).

The majority of these welfare areas concern elderly and old people, but they are also important for the longevous. There is no one and only „ageing code”. The vital needs of humans are current at any age, regardless of statistics and trends. The civilization project mentioned

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above stated the importance of the effectiveness of measures taken for the development of social capital and reaching the strategic goal of improved quality of life. The authors wrote: „The Polish history generated a strong social capital of survival (maintaining identity), and the years of transformation gave the social capital a new character, which adjusts more to the changing reality, and whose nature is adaptability. However, the future challenges are connected with a new model: the social capital for development (which includes, among others, a greater ability to cooperate, share tasks and responsibility, and greater openness towards each other” (Boni, M.(ed.), 2011, p. 46).

We cannot wait, therefore, for the adverse economic and social results of the ageing of the society, which are soon to come. The social capital for development should be created now. The mechanism of adjustment to received condition can dull our instinct of survival and self-development, and significantly delay the reaction to demographic and social changes. The durability and efficiency of the social capital for development may be assured only by effective and wise actions to prevent unwanted and unfavourable results. Therefore, how should we include in these actions the social group which will soon dominate our family, professional, and social life? Which way should we choose to tap the potential present in elderly people? How to ensure the life welfare of the society without forgetting those who cannot and should not be set aside? How to open the elderly for the local environment and its needs?

These questions motivated the authors of yet another planning document from, called *Strategia Rozwoju Kapitału Ludzkiego* [Strategy for human capital development]. The project was put up for public consultation and discussed. A range of social and economic instruments was proposed there, in order to help our society to find its way in the new demographic and economic situation. According to its authors, „On the one hand, tools will be implemented to directly prevent the depopulation of Poland and ageing of the society. On the other, instruments will be introduced to adapt the society and economy to a demographic environment different than before. These instruments will allow and facilitate the prolongation and increase of economic and social activity of both the already active people and the groups and individuals who now largely remain outside of the work market and are threatened with social exclusion; they will also ensure the highest possible quality

of life in the old age” (Zespół Doradców Strategicznych Prezesa Rady Ministrów, 2011, p. 3). Old age is one of the important stages included in the strategy. The current situation of seniors in Poland was presented there, along with the actions already implemented, planned, and necessary to be taken in the future. All this was enclosed in five concrete instruments to implement changes:

1. A new model of care of dependent people, based on a budget-insurance system
2. Delaying the age of effective professional deactivation
3. Implementing changes in the pension system, leading to the increase and prolongation of professional activity
4. Promoting professional and social activity of senior citizens: the „silver economy”
5. Increasing the availability and quality of health care of elderly people (Zespół Doradców Strategicznych Prezesa Rady Ministrów, 2011, pp. 157-168).

To relate to the subject of old age as a task for development and building a social capital for development, the fourth instrument seems to be the most interesting, as it deals with the promotion of seniors’ professional and social activity. By observing the phenomena and social issues present in the life environment of the elderly, and based on EU documents as well, the authors of the strategy present the suggested actions to be taken in the nearest future, which sums up, to some extent, the presented choice of analyses. According to the authors, the following areas need the most attention:

- Promoting the patterns of learning and education for the old age (retaining professional and social activity for as long as possible, sustaining social contacts, the need to be needed),
- Better meeting the needs of everyday life (unburdening the traditional health care and social care services),
- Increasing investment for the promotion of sport and recreation among seniors, including the disabled ones,
- Promoting voluntary activity among seniors,

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- Facilitating para-professional activity at the time of retirement (e.g. fulfilling a consultative role in the company where one was employed before, serving important educative functions),
  - Promoting the advantages of social activity among the elderly as part of civic society (the willingness to affiliate with organizations and associations),
  - Promoting the idea of age management in business (the advantages of retaining experienced employees and creating career path contributing to human resources management),
  - Launching a promotional campaign for *silver economy* (widening the market of goods and services for older consumers, specialized services for the elderly) (Zespół Doradców Strategicznych Prezesa Rady Ministrów, 2011, p. 166).

These tasks can actually be quite reliably implemented. Most importantly, they indicate the vulnerable areas, in particular regarding education and work market. Various examples of the activities described can be observed even today. I believe that a particular attention should be paid to the education for the old age, voluntary work of the elderly, and their pro-social activity in various organizations. These are the simplest, least expensive, and still very efficient ways to activate elderly people. They are measurably advantageous to the participants, as well as the recipients of the goods offered by the seniors. They show the whole society, and especially the youngest generation, that old age does not have to mean loneliness, passivity, apathy, and isolation. The old age should become a true developmental task of the proportions of the needs and expectations of today, and not of decades ago.

### **Own reflections**

Today, the professional, social, and educational activity of the elderly is no longer a matter important only to them. More and more often, we see and evaluate this activity from the viewpoint of social and economic development of our country. Ensuring the living welfare of the elderly is an important link in the chain of success and welfare of the whole society. This is why we should strive today to most

efficiently improve the level of this activity, so that our seniors should not be seen ranked last in the lists measuring the factors responsible for the creation of convenient and promising conditions for the development of the society.

Everyone chooses her own lifestyle, as well as the style of ageing, following the tradition, custom, habits, needs, capabilities, fashion, and sometimes even compulsion. However, there is also the self-learning, self-education, and conscious social education. It is owing to these processes that our choices do not always have to be determined by age. Then, the personal fulfilment and realization stem not from the fact that we are seniors of 60+ years, but instead from the fact that we are people, living among and for others.

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