

The Active Ageing Index and its extension to the regional level (Cracow, 15-16 October 2014)¹

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1. Background and objectives

The concept of active ageing became a part of the wider European public discourse in 2012 during the European Year for Active Ageing and Solidarity between Generations (EY2012). At first, the focus was set on employment and productivity in the labour market and the debate was somehow dominated by issues related to pension reforms and prolonging working lives. However, the wider scope was also present and it was clearly expressed in an 'active' approach to ageing. Age-friendly environments, capacity for ageing, social infrastructure that enables senior – active and healthy – citizens to remain active within the society – all these issues are important when the concept of active ageing is taken into account. In Poland, EY2012 marked the starting point for various governmental initiatives in the area of active ageing policy for senior citizens.

In August 2012 the Government Programme for Social Participation of Senior Citizens (called ASOS) was launched. Moreover, a Department of Senior Policy has been established within the Ministry of Labour and Social Policy. The Ministry also started – with civil society support and collaboration (Council of Senior Policy) – the process of preparation of the first strategic document *Long-term senior policy approach in Poland for 2014-2020 (Założenia)*, finally adopted by the Government in December 2013.² Along with these actions, also the updated Programme of Solidarity of Generations was adopted which mostly focuses on supporting active ageing in labour market policy.

In the framework of EY 2012 the *Active Ageing Index (AAI)* has been constructed as a tool to measure the untapped potential of older people for active and healthy ageing across the EU countries (Zaidi et al, 2013, see also the web page of the [Active Ageing Index](#)). It demonstrates the level to which older people live independent lives, participate in paid employment and social activities as well as their capacity to actively age with dignity. When the overall AAI index including all domains is taken into account, Poland scored very low values in 2012 (see Figure 1).

To better understand the factors behind Poland's low position, in 2013 the Ministry of Labour and Social Policy decided to engage an external expert to prepare a first

¹ Prepared for the Peer Review in Social Protection and Social Inclusion programme coordinated by ÖSB Consulting, the Institute for Employment Studies (IES) and Applica, and funded by the European Commission.
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² On December 24, 2013 three strategic documents, the so called Government Package for Senior Citizens, were adopted by the Council of Ministers: the Government Programme for Social Participation of Senior Citizens for 2014-2020; the Long-term senior policy approach in Poland for 2014-2020; and the Programme of Solidarity of Generations (Programme 50+).



research report on the AAI in Poland. The particular focus of the work was to explore the main differences between AAI scores not only at national level but mostly at regional one. This is important, as in Poland there are 16 voivodships in which the regional governments are responsible for many fields of the various policies. The objective of the study was also to check if the output of such analysis could be somehow used in better planning of interventions in the domains of the active ageing concept at regional level and be used by regional policy makers.

The research report was prepared in September 2013. It launched wide discussion on how to make the use of AAI possible on regional level in order to develop active ageing policies locally. It was also confronted with the indexes prepared by the OECD in its evaluation of the regional performance and preparation to demographic changes (OECD and Ministry of Infrastructure and Development Conference, Warsaw, January 2014³). One of the main conclusions of the report prepared for the conference was to highlight the impact of demographic change and its interconnection with economic, employment and social factors that require localised solutions. In the report the Demographic Change Dashboard (DCD) was utilised to assess the impact of demographic transition at a regional scale between 2000 and 2010 for selected Polish regions of Mazowieckie, Śląskie, Lubelskie, Podkarpackie, Podlaskie, Dolnośląskie, Opolskie, and Kujawsko-Pomorskie. What could be interesting in view of the active ageing index is that a Polish 'Silverprint' was developed to assess the speed of ageing combined with the score of the Global Ageing Index.

The aim of this short host country paper which could open a discussion during the Peer-Review in Cracow in October 2014 is to present the main findings of the expertise as well to identify methodological but also policy making issues which occur if we look at the active ageing regional approach for Poland.

³ http://www.efs.gov.pl/2014_2020/Strony/Zmiany_demograficzne_wyzwaniem_dla_polityki_spojnosci.aspx?N=N Please see the link to two presentations: http://www.efs.gov.pl/Wiadomosci/Documents/Cristina_Martinez_Fernandez.pdf and http://www.efs.gov.pl/Wiadomosci/Documents/Prioritising_Actions_for_DC_and_Ageing_Poland.pdf



Figure 1. AAI – Ranking of countries, 2013 (source: Policy Brief: Introducing the Active Ageing Index and Zaidi et al, 2013)

OVERALL	Employment	Social participation	Independent living	Capacity for active ageing
1 Sweden	1 Sweden	1 Ireland	1 Denmark	1 Sweden
2 Denmark	2 Cyprus	2 Italy	2 Sweden	2 Denmark
3 Ireland	3 UK	3 Luxembourg	3 Netherlands	3 Netherlands
4 UK	4 Portugal	4 Sweden	4 Finland	4 Luxembourg
5 Netherlands	5 Estonia	5 France	5 Germany	5 UK
6 Finland	6 Denmark	6 Netherlands	6 UK	6 Ireland
7 Cyprus	7 Finland	7 Finland	7 Ireland	7 Finland
8 Luxembourg	8 Netherlands	8 Austria	8 Luxembourg	8 Belgium
9 Germany	9 Romania	9 Belgium	9 France	9 France
10 Austria	10 Germany	10 Denmark	10 Slovenia	10 Austria
11 Czech Rep	11 Ireland	11 UK	11 Czech Rep	11 Germany
12 France	12 Latvia	12 Czech Rep	12 Belgium	12 Spain
13 Portugal	13 Lithuania	13 Cyprus	13 Austria	13 Malta
14 Belgium	14 Czech Rep	14 Spain	14 Hungary	14 Czech Rep
15 Italy	15 Austria	15 Malta	15 Lithuania	15 Italy
16 Estonia	16 Bulgaria	16 Slovenia	16 Romania	16 Bulgaria
17 Spain	17 Greece	17 Hungary	17 Malta	17 Cyprus
18 Lithuania	18 Spain	18 Lithuania	18 Estonia	18 Portugal
19 Malta	19 Slovenia	19 Germany	19 Italy	19 Slovenia
20 Romania	20 Luxembourg	20 Portugal	20 Cyprus	20 Lithuania
21 Slovenia	21 France	21 Greece	21 Poland	21 Estonia
22 Latvia	22 Italy	22 Latvia	22 Spain	22 Poland
23 Bulgaria	23 Slovakia	23 Slovakia	23 Slovakia	23 Greece
24 Greece	24 Poland	24 Estonia	24 Portugal	24 Slovakia
25 Hungary	25 Belgium	25 Romania	25 Greece	25 Hungary
26 Slovakia	26 Malta	26 Bulgaria	26 Bulgaria	26 Latvia
27 Poland	27 Hungary	27 Poland	27 Latvia	27 Romania

2. Regional Active Ageing Index for Poland⁴

Policy objectives

The idea behind a regional AAI for Poland was to identify regions where the promotion of active ageing is less supported than in others in order to encourage regional and local authorities to make an intervention and possible changes within their policy.

Research approach

The Polish research project of preparing the regional active ageing index in Poland followed the original approach of the Active Ageing Index and was also composed of four domains:

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

The research showed that in some areas the specific data is not available and that is why the final concept differs from the original approach – for instance data on the employment rate of older citizens over 70 is not included. The research is mainly based on data from the Central Statistical Office or nationwide representative surveys such as *Social Diagnosis (Diagnoza Społeczna)*. The data used is mostly from 2010 and 2011 as in the original index also to make a baseline year before EY2012. And then it could be treated as a starting point for monitoring changes in domains over one, two or more years, especially after interventions which begun since EY2012. The monitoring work could also be used to identify innovative policies & programmes that promote active and healthy ageing at the regional level.

In the research there is a detailed description of original and used indicators and comparison between them (including sources of data) and where the main differences between them exist and if they could be explained. For example **Share of healthy life years in the remaining life expectancy at age 55** (original indicator) was replaced by **Share of healthy persons aged 65+** (which means persons who are not disabled and declare that their health condition is satisfactory). The detailed list of indicators which have been skipped and/or replaced by other indicators in the Polish approach of the active ageing index could be found in Perek-Białaś, Mysińska, 2013. More details will yet be distributed during the Peer-Review. There are not as many changes as might be expected, however, some indicators were still not used and not replaced, e.g. material deprivation of older persons at regional level.

The aim of the research was to present whether, despite some variations in source of data, the concept of AAI can be used and somehow adopted on a regional scale.

⁴ It has to be stressed that it was the first attempt to the task and further updating are planned after the Peer Review discussion in Cracow. More and the full version of the expertise could be found in Polish and also in English at the web page of the Ministry and the Senior Policy Department, www.senior.gov.pl/en



Overview of results

Below, there will be just a few results presented to show how the index could be used.

A. Employment

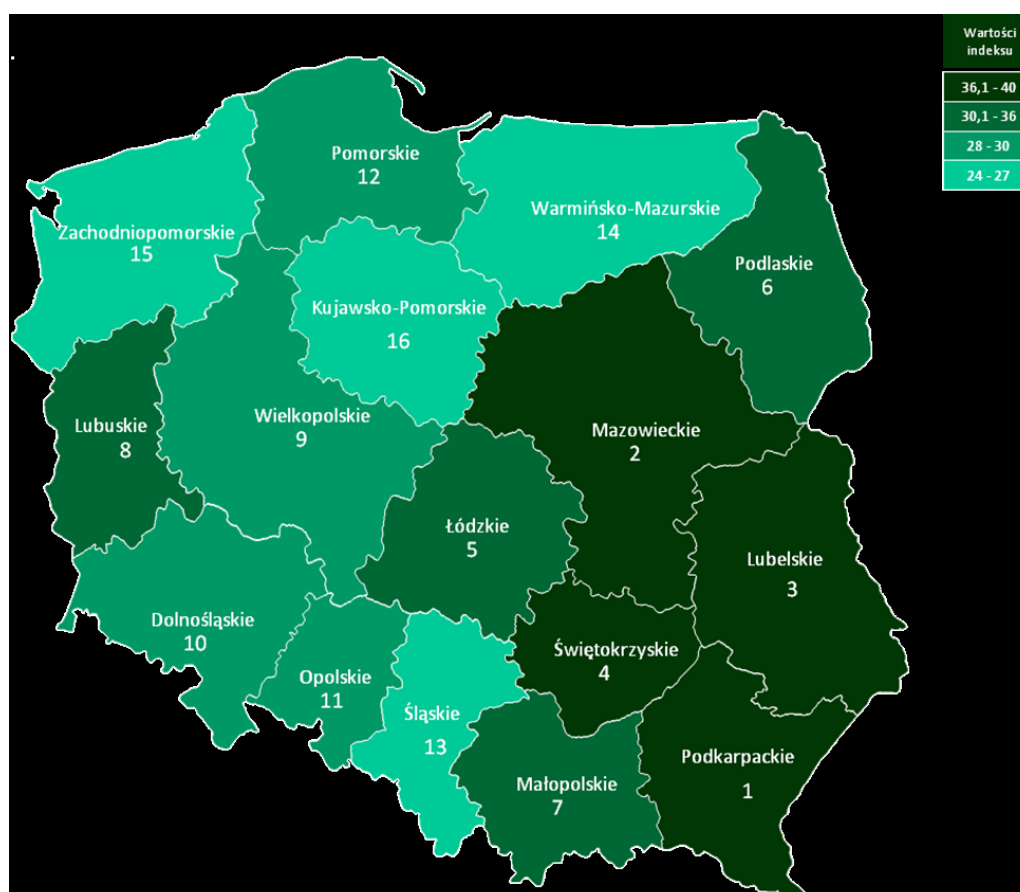
This domain includes 3 different indicators:

1. Employment rate for the age group 55-59;
2. Employment rate for the age group 60-64;
3. Employment rate for the age group 65-69.

A decision was taken not to use the fourth indicator from this domain from the original Active Ageing Index due to the fact that in Poland the retirement age for women was 60 and for men 65 and especially at regional level information about the employment rate for the age group 70-74 was just not available.

When the **domain of employment** is considered, central and south-eastern Poland score the highest values with Podkarpackie and Mazowieckie regions as the leaders. The lowest values are achieved by northern regions, especially Kujawsko-Pomorskie region.

Figure 2. Ranking of regions – overall ranking based on all indicators of this Employment domain (source: own preparation)



B. Participation in society

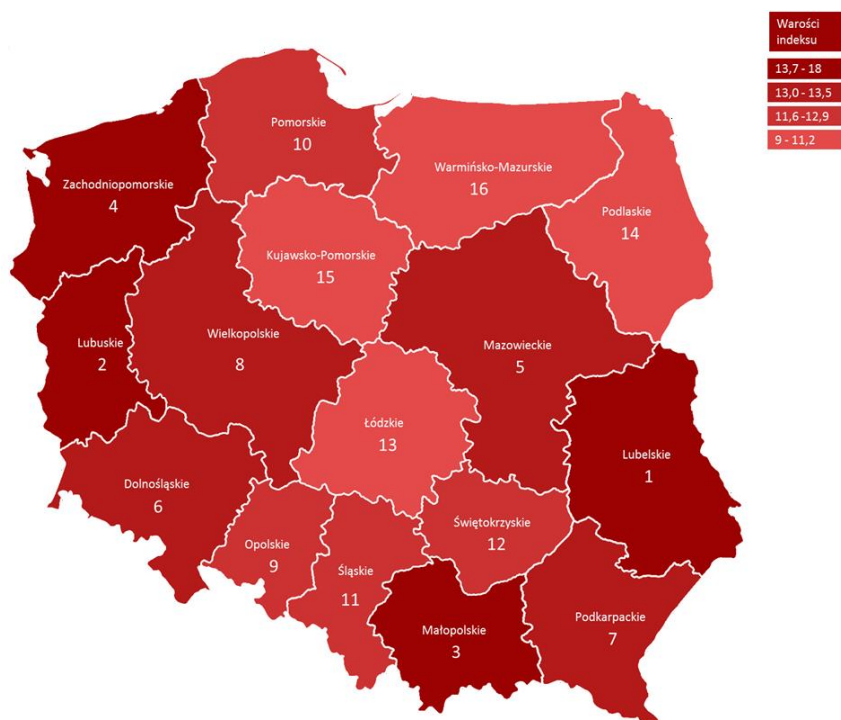
This domain includes 4 different indicators:

1. Voluntary work 55+;
2. Care for children and grandchildren 55+;
3. Care for other dependent and older people;
4. Participation in public meetings.

In this area, the leader is Lubelskie region (eastern Poland) but the regions Lubuskie (northern) and Małopolskie (southern) are very close to the leader region.

The lowest values of the overall indicator in this domain were gained by the following regions: Warmińsko-Mazurskie, Kujawsko-Pomorskie and Podlaskie (north-eastern Poland).

Figure 3. Ranking of regions – participation in society (source: own preparation)



C. Independent, healthy and secure living

In this domain not exactly the same indicators were used as in the original Active Ageing Index set-up. There was – due to methodological problems – a need to use an adapted version of the indicators as below:

1. Physical activity;
2. Accessibility of healthcare;
3. Independent living alone (75+);
4. Financial situation;
5. Satisfaction from material situation;
6. Physical safety;
7. Use of computer.

Figure 4. Ranking of regions – Independent, healthy and secure living



In this area leader regions are Śląskie, Wielkopolskie and Mazowieckie. The lowest values were scored in: Świętokrzyskie, Warmińsko-Mazurskie and Podkarpackie regions.

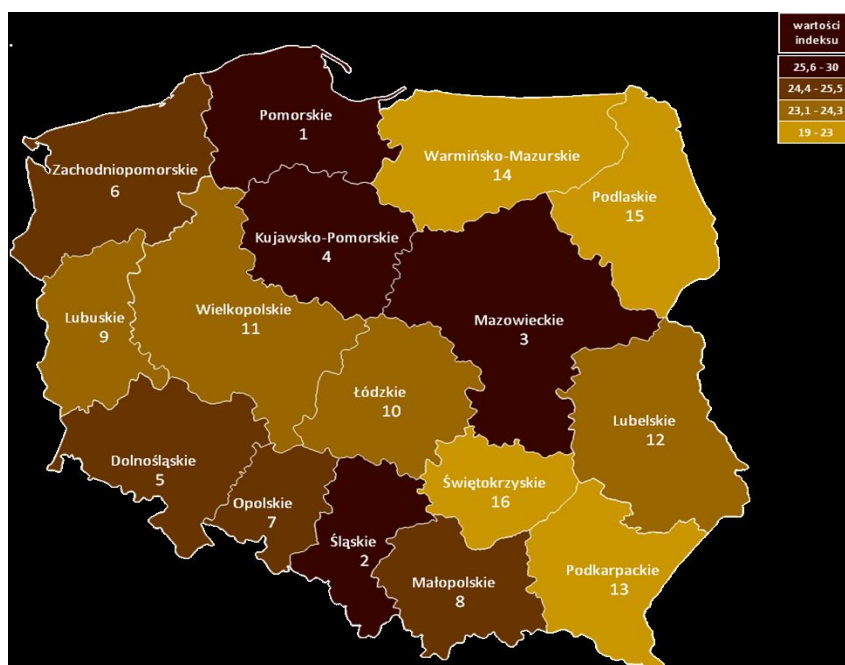
D. Capacity and enabling environment for active ageing

This domain is composed of the following indicators:

1. Life expectancy of persons in age of 55;
2. Share of healthy persons in age of 65+;
3. Mental well-being (55+);
4. Use of Internet (55-74);
5. Social ties (55+);
6. Share of persons with tertiary education in age of 55+.

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

Figure 5. Ranking of regions – capacity and enabling environment for active ageing



To check the stability of the overall ranking of the Active Ageing Index for regions in Poland, three different scenarios were used (here only two of them are presented) with different weights values of indicators of all domains. Regardless of weights used, Mazowieckie region scores the highest values.

3. General conclusions

The main aim of this host country report which includes results of the *Regional Active Ageing Index for Poland* was to briefly outline in what way the potential of older citizens on the regional level of the country could be caught based on the original methodology of the Active Ageing Index. The research was aiming to answer a key question, i.e. whether it is possible to adopt the original concept of AAI in our Polish regional perspective and to compare not only whole countries but also regions. Then the aim was to test if this tool could be used in policy making. Before concluding remarks which are related to policy, first a few methodological remarks will be presented. We consider it better to split the conclusions into those which are related to policy making and those which are methodological ones.

Methodological remarks

In countries like Poland, regional differences are clearly visible although the methodology used can be further discussed and refined.

Each single indicator included in this first attempt of such analysis must yet be additionally checked, evaluated and confronted with data which could/should be used in further analysis. The problem is that some data are not available at the regional level, e.g. by gender and by some categories which could be useful in such analysis (like differentiation between rural and urban, cities vis-a-vis villages etc.). Also, it is not possible every year to capture all needed and necessary indicators for the regional index of active ageing in Poland as many are based on surveys which are not carried out on an annual basis. Some data are just not updated as quickly as we need them for designing and then effective implementation of the best measures in the policies linked to the active ageing outcome.

It is worth highlighting that weight values can be seen as debatable to some extent. In the research three different scenarios were used, just to show how changing the weights can matter in changing the position in ranking. The first one was in accordance with the original concept, the second and third took into account various possible weighting approach (i.e. equal treatment of all domains).

However, these differences in weighting methodology were not so important in the final findings – the leading regions remained the same despite different weights but it has to be admitted that differences between regions in the overall and sometimes in single indicators were not so large.

What is more important, is that some data cannot be directly compared due to their source. Some are based on secondary data available from registers, some are based on statistical data which are additionally computed and other on surveys and polls results.

Policy making issues

AAI on national and regional level should be used as an instrument for understanding challenges for active ageing policy which is an element of a policy package related to i.e. labour market, health, social assistance and wellbeing policy.

Due to the demographic change active ageing policy is now on top of the social policy agenda in the context of the new programming period 2014-2020. For EU member countries like Poland it will be one of the most crucial periods for investing EU funds, especially from the European Social Funds.

For the evidence-based policy approach, the AAI is one of the crucial element for designing and reforming policy instruments in the next seven years. We can



observe an interest in the AAI by the policy making bodies both on the national and regional level.

The idea is to find out gaps in the active ageing field across Poland via the AAI, and to design the appropriate measures and policy guidelines for different regions. The recommendations for intensifying policy on the regional level should be dedicated to policy makers and other stakeholders themselves as active ageing involves different partners.

Variations in AAI show what and where it works better if we analyse the active ageing index and what is missing to make good use of the untapped potential of older citizens on regional and local level in Poland and also in what areas the regions should offer interventions or actions to change their position.

Here, especially the next funds under the European Social Funds (2014-2020) could be better allocated if looking at the ranking of the regional Active Ageing Index. The regional authorities should know which domains of the Index could be better strengthened and improved by adequate actions and interventions (like increasing of social participation of older people).

The regional Active Ageing Index provides a tool and shows the direction which a region should take to be more age-friendly in various domains and therefore to change their position compared to other regions of Poland and consequently for Poland having a chance to change its overall position in the European ranking of the active ageing index. As far as we know so far, some interest in the active ageing index in the regional perspective was expressed by the representative of the Warmińsko-Mazurskie voivodship as said in the next ESF programming.

On the other hand, for the Ministry of Labour and Social Policy, especially the Department of Senior Policy which is responsible for the Government Programme for Social Participation of Senior Citizens (ASOS), somehow the work proves this variation. This Programme introduced just in 2012 is dedicated to organisations (mainly for grass roots initiatives) that operate in the area of public benefit for senior citizens. Mazowieckie region that scores the highest values in the AAI is also the leader in a number of projects for seniors submitted under the open call for proposals within the Programme. There are several reasons for that. Firstly, the number of active organisations is the highest in the country, secondly – better economic conditions and, social infrastructure. Likewise, regions with low positions in the ranking of the AAI are less represented in the ASOS Programme but this is also related to their lower activity in other economic domains (labour market, economic performance, etc.). If the regional Active Ageing Index is calculated in the future, the next step should then show the changes in all domains. Also, thanks to this ASOS Programme the change could be noticed, as well as other national and regional governmental initiatives. In this sense, it will be an additional evaluation tool for ASOS as it was calculated based on data before EY2012, and consequently before this Programme.

The Active Ageing Index can still be a useful base for policy makers on regional level as was found by participants of the *International seminar on Social policy in the time of ageing – long-term senior policy approach*, (Warsaw, Oct 30, 2013) but also by members of the Council of Senior Policy which frequently meets to consult various actions and policies with the Ministry. There was a high interest in the results of this work and it shows the usefulness of the regional AAI. And it changes the awareness that the active ageing concept is something more complex and not only related to labour market activity.

Whether it should be changed or modified to be better adjusted to national, regional and mostly local specificity of the country remains a starting point for



discussion. We of course realise the limitations which are already noticed and which could yet be additionally indicated thanks to the Peer Review. However, at this stage of the work it is also important to see how in other countries policy makers at regional level can use this or a similar approach to better planning of the active ageing policy.

Bibliography

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Appendix:

Regional Active Aging Index for Poland. Executive Summary:
http://senior.gov.pl/source/PL_Regional_AAI.pdf

