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MUNICIPAL INITIATIVES INTENDED FOR PERSONS AGED 50 AND OVER IN THE OPOLE SPECIAL DEMOGRAPHIC ZONE

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Abstract: The Opole region struggles from the most unfavourable demographic situation among all Polish administrative regions. The region is not only losing its population but also reports a growing number of inhabitants aged 50 and more. For this reason, demographic challenges are high on the region's development agenda. The establishment of the Special Demographic Zone for Opolskie Voivodeship (SDZ) has provided an incentive to take measures, both on the local and regional scale, to reverse the undesirable situation.

This article discusses one of the SDZ packages, namely Package 4 Golden Autumn intended for persons aged 50 and more. Based on surveys held in the municipalities of the Opole region, the author seeks to answer questions related to the perception of the existing demographic processes as developmental barriers and looks at different initiatives and action taken by local self-governments for 50+ residents.

Keywords: Local development, special demographic zone, demographic challenges, Opolskie Voivodeship

JEL codes: R58, J11

Introduction

Scientific research and EU programme documents point to specific barriers that will bear upon the shaping of our visions of the future. Some of them are social phenomena, such as adverse demographic changes (Fesus et al. 2008; ESPON 2014). What follows, the strengthening and shaping of the human and social capital coupled with the analysis of demographic processes (including migration patterns) are seen among the key objectives of today's socio-economic policies at the level of the EU and of the individual member states and regions.

Eurostat data clearly shows that the ageing of the population is already a common trend, although its scale varies from region to region (this is also visible in Poland). In the EU of 2016, every fifth citizen was 65 and over; in 2050, it will be one out of three. These processes foster a rapid growth in demand for health care services. In the future, the silver economy is likely to become one of the elements of the mainstream labour force participation. Although the key EU strategic document, EU 2020 Strategy (2010), fails to address the demographic problem directly, among its 11 thematic areas there are a few that allude to the silver economy. As Szlachta points out (2018), the investment priorities for 2014–2020 laid down in EU regulations attempt to respond to existing demographic challenges. An example of such an approach is the Special Demographic Zone in the Opole region along with some related initiatives.

Special Demographic Zone as a tool of development policy

In demographic terms, the situation of Opolskie Voivodeship, against the backdrop of the entire country, is the most unfavourable. The main causes of this state of affairs are the low birth rate, the forecast rate of natural increase, the net migration rate and total population growth (Szczygielski 2015), but also some under-the-surface civilisation processes related to the family crisis, reduced propensity to get married, a volatile economic and ethnic situation in the region, and migration processes (Rauziński 2014). Depopulation, i.e. the decline in population accompanied by ageing processes, is regarded as the main development barrier in the Opole region. Between 2007 and 2015, the number of region's inhabitants dropped by 41,000 (from 1,037,000 to 996,000), and the depopulation rate reached -4% (Poland's average is -0.8%). The largest population loss was reported in the city of Opole: -7,718, which translates into the depopulation rate of -6.2%. There is a visible differentiation in the depopulation rate across the region's districts (Pol. *powiat*) outside the city of Opole: it is as much as -5.9% in Głubczyce District and up to -1.0% in Brześć District (*Analiza sytuacji...* 2016). The research and analyses carried out also reveal that depopulation processes unfold differently in the rural and urban areas of the Opole region (Dybowska 2011, 2016; Heffner & Solga 2017). The latest forecast by the Chief Statistical Office of Poland shows that in the years 2008–2035 the population of the Opole Region is bound to drop by more than 15%. Both cities and villages are envisaged to depopulate, yet the phenomenon is likely to be more severe in urban areas (Dybowska 2016).

It is not only the declining number of inhabitants but also the changing age structure that is going to pose a serious development challenge for the region. In 2015 the percentage of inhabitants of the Opole region aged 50 and more was 38.4% (Poland's average was 36.5%), which was up by 5.4 pp compared with 2007 (*Analiza sytuacji...* 2016). That is why the development strategy of Opolskie Voivodeship primarily focuses on the existing demographic trends, specifically addressing the 50+ population.

The key development programming document, i.e. the Opolskie Voivodeship Development Strategy, recognizes the prevention and counteraction of depopulation processes as the most serious challenge facing the Opole region). The adverse demographic situation of the region is regarded as the most formidable development barrier (*Opolskie Voivodeship Development Strategy until 2020* 2012). The Opole region is losing its population capital as a result of: high out-migrations and low birth rate. In recent years, it has decided to address the condition of the socio-economic sphere in a comprehensive manner. The four thematic development challenges of the regions named in the Strategy are:

- preparation for participation in the labour market through active society,
- competitive economy driven by innovation and cooperation with the academia,
- attractive areas for living, investment, and recreation,
- sustainable development of Opole agglomeration and region's cities and rural areas.

These challenges are to be addressed through strategic and operational objectives. The Strategy itself points to the necessity to establish a Special Demographic Zone (SDZ) for Opolskie Voivodeship, along with defining the model and terms of cooperation and highlighting the need to involve public and private entities. Opolskie for the Family: a Special Demographic Zone Programme for Opolskie Voivodeship until 2020 proposes action aimed to prevent some basic negative phenomena, such as:

- the highest level of depopulation among all Polish regions,
- a growing demand for medical and care services associated with the significant extension of average life expectancy,
- mass economic out-migration and brain drain,
- a dramatic decrease in the birth rate and the shifting of mother's mean age,
- a growing death rate,
- change in the demographic composition of the region (mainly the dwindling number of citizens in pre-working age),
- unfavourable demographic forecast indicating that Opolskie Voivodeship is depopulating at a rate threatening both the socio-economic development processes and public finance.

The SSD Programme envisages the implementation of four packages: Work means a safe family, Education and the labour market, Nursery and pre-school care and Golden Autumn (this one is subject to further analysis).

Package 4 Golden Autumn is intended to increase access to services for the elderly and make them more active¹. The package is expected to offer incentives to seniors (such as: professional, movement, cultural, and educational incentives) and contribute to shaping the perception of older people and intergenerational social integration. Three specific objectives have been identified to serve this purpose: improvement of the quality and accessibility of services for seniors, promotion of active ageing, and development of digital literacy of people aged 50 and over. The

¹ The package is designed for people aged 50+ because, in demographic terms, this period of life is known as "the foreground of old age".

proposed package activities and initiatives are: services for seniors and active senior (pp. 67–71,75).

To ensure efficient management of the programme, selected ideas and recommendations of the SDZ have been included in the Regional Operational Programme of Opolskie Voivodeship 2014–2020. The development and adoption of the SDZ Programme also offers an option to create new regional specializations, for example, life and environmental science (p. 67). Thus, the Opole region stands a chance of creating its unique regional specialization, based on its endogenous potential and experience gathered through the implementation of the development policy².

The SDZ Programme, designed and coordinated by the Marshal's Office, points to local self-governments as key partners; hence, the idea of conducting a survey among the local municipalities regarding the initiatives set up for people aged 50 and over.

Local self-governments' initiatives for seniors: research results

The survey duration was two months (December 2017 – January 2018). It contained a maximum of 29 closed questions³ and one open question (optional) to allow a surveyed municipality to share its own practice. It was anonymous and was submitted to all local self-governments of the Opole region⁴. There are 71 municipalities in Opolskie Voivodeship (including: 35 rural, 33 urban-rural, 3 urban) and one city enjoying the rights of a district. The survey was completed by 40 municipalities. Table 1 shows their differentiation by type.

The survey was structured into a set of thematic blocks as follows:

- the general part containing questions concerning: barriers to development, building a competitive advantage, approach to social issues, including demography, in the relevant programming documents, image of the municipality (first seven questions in the survey),

Table 1. Municipalities participating in the survey on action taken by local self-government units intended to improve the quality and accessibility of services for seniors (people aged 50+)

Type of municipality	Number of answers	Percentage in total number of municipalities (%)
urban	2	67
urban-rural	20	60
rural	18	51
Total	40	56

Source: Own study based on survey results.

² Of key importance in this approach is a continuous monitoring of programme implementation. Cf. *Informacja na temat realizacji w 2016 roku programu Specjalnej Strefy Demograficznej w województwie opolskim do 2020 r. „Opolskie dla Rodziny”* (2017) Marshal's Office of Opolskie Voivodeship, Opole.

³ The number of questions depended on provided answers, as some of the questions were logically linked to each other.

⁴ The survey was created in the Webankieta platform. The link to the survey and the invitation to participate were sent to local self-governments by the Marshal's Office.

- second part containing questions 8 to 25 and regarding activities for 50+ persons,
- third part concerning communication and participation (questions 26–30).

The surveyed municipalities confirmed that depopulation and decline in the number of inhabitants were the most burning development problems. From among 40 municipalities completing the survey, only two (one rural with the population of up to 3,000 and one urban-rural with the population from 5,001 to 10,000) admitted that that had seen an increase in the number of inhabitants over the last five years; a significant decrease was reported by as many as 18 municipalities (one urban, six rural and 18 urban-rural). The remaining 20 municipalities declared that over the last 5 years the number of inhabitants had remained stable. The municipalities reporting a significant decline in the number of inhabitants were as follows: one with the population of up to 3,000, one with the population ranging 30,001–50,000 and above 50,000, two with the population ranging 20,001–30,000, three with the population ranging 10,001–20,000 and as many as nine municipalities with the population ranging 5,001–10,000.

Among the social problems, including poor demography, identified by the studied municipalities as the most formidable development barriers were⁵:

- economic out-migration (83%), mainly from urban-rural municipalities,
- ageing of the population, an increasing percentage of inhabitants in post-working age (80%), mainly in rural municipalities,
- outflow of young and educated inhabitants to larger cities (70%), mainly from urban-rural municipalities,
- hindered access to specialist public health care: absence of specialized doctors in the municipality, e.g. cardiologist, gynaecologist, allergist (43%), observed in all types of municipalities to comparable extent,
- low birth rate (35%) – this barrier was highlighted mainly by rural municipalities.

The municipalities wish to build their competitive advantage through: good access to pre-school care (55%), attracting investors and generated jobs (53%), regeneration and development of new attractive public spaces as meeting points (45%), development of infrastructure and senior-friendly services (35%) and the development of social integration facilities, including those fostering intergenerational integration (25%).

Out of 22 municipalities indicating that their competitive advantage is determined by good access to pre-school care, as many as 11 were rural municipalities (besides nine urban-rural and two urban municipalities).

Attracting investors and having new jobs was seen as an advantage by 21 municipalities, including 13 urban-rural and 8 rural. Regeneration and development of new attractive public spaces as meeting points is a factor in advantage-building for 18 municipalities, including 12 urban-rural and six rural. Infrastructure and senior-friendly services are vital for 14 municipalities (seven urban-rural, six rural

⁵ Only those barriers are discussed which scored above 30% in the responses.

and one urban). The development of social integration facilities, including fostering intergenerational integration, is important for ten rural municipalities.

The fewest indications in this category concerned: availability of residential premises (including public/municipal premises) – 8% (three municipalities, all urban-rural) and a wide range of leisure activities for high schoolers – 5% (two municipalities, including: one rural and one urban-rural).

When it comes to addressing such challenges in the relevant policy papers, 65% (26) of the surveyed municipalities declared that they had developed and adopted some strategic document attempting to handle some specific social issues (these are usually policies intended to resolve social problems; they are adopted mainly in urban-rural municipalities – 20 documents). Among the surveyed municipalities, 12 (including: one urban, seven rural, four urban-rural) have adopted a brand/municipal slogan – four of them alludes directly to quality of life.

Speaking of the municipality's own tasks, the responses to question eight seem interesting. The question was, "Who do you think should take care of the inclusion of seniors?". 100% of the surveyed municipalities are of the opinion that it should be the state (75% said "Definitely yes"), 95% responded that it should be local self-government units (among them, 37.5% said "Definitely yes"), 90% point to non-governmental organizations (among them, 32.5% said "Definitely yes"), 87.5% think that it should be 50+ people themselves (among them, 35% said "Definitely yes"), 70% of the surveyed local self-governments believe that this was the responsibility of churches and religious organizations (among them, 22.5% said "Definitely yes"). The fewest municipalities pointed to the business sector as a group that undertake initiatives for the inclusion of older people. This opinion was voiced by 37.5% municipalities (among them, 7.5% said "Definitely yes" and as many as 22.5% said "No"). Such an approach may hinder the process of reaching potential partners that may like to join the initiative on a public-private partnership basis. It is worth noting that, in the opinion of the surveyed municipalities, it is the Marshal's Office and local self-governments that take the most effective action for the benefit of seniors. Enterprises are considered least engaged and least effective (question 24 in the survey).

The reminder of the survey concerned initiatives set up by the municipalities for people aged 50+. The activities performed by the local self-governments concerned:

- improvement of the quality of products and services for seniors,
- improvement of accessibility of products and services for seniors,
- active ageing,
- improvement of digital literacy among seniors,
- age management at the municipal office and subordinate units (Table 2).

This situation is not likely to change much in the near future, as the municipalities declare that over the next two years they will be focusing on:

- improvement of the quality of products and services for seniors (45%, a drop by 3 pp),
- improvement of accessibility of products and services for seniors (43%, a drop by 7 pp),
- active ageing (75%, a drop by 3 pp),

Table 2. The activities performed by the municipalities for people aged 50+

The activities performed by the local self-governments	The number (and percentage) of municipalities which declare activities	Municipalities		
		urban	urban-rural	rural
active ageing	31 (78%)	2	15	14
improvement of digital literacy among seniors	26 (65%)	2	15	9
improvement of accessibility of products and services for seniors	20 (50%)	1	10	9
improvement of the quality of products and services for seniors	19 (48%)	1	9	9
age management	5 (13%)	0	2	3

Source: Own study based on survey results.

- development of digital literacy of seniors (55%, a drop by 10 pp),
- age management in the municipal office and subordinate units (8%, a drop by 5 pp).

It should be highlighted that the initiatives scheduled by the local self-governments for the coming years in each category exhibit a downward trend, which is not beneficial considering the constantly growing number of people aged 50 and over.

Discussed below are some initiatives undertaken by the surveyed municipalities in the relevant categories. The sequence reflects the number of indications in the survey.

With regard to the promotion of active ageing, the municipalities most frequently took the following action: occasional events for/with the participation of seniors (72.5% or 29 municipalities, among them: 13 urban-rural, 14 rural and two urban), activities encouraging the pursuit of hobbies and passions (52.5% or 21 municipalities, among them: 13 urban-rural, seven rural and two urban), support for Senior Clubs (45% or 18 municipalities, among them: 12 urban-rural, five rural and one urban), general and specialized courses and training sessions for seniors (45% or 18 municipalities, among them: 11 urban-rural, five rural and two urban). 42.5% or 17 municipalities indicated:

- support for the development of Third Age Universities (among them 13 urban-rural, two rural and two urban),
- promotion of healthy lifestyle (among them: nine urban-rural, seven rural and one urban).

40% or 16 municipalities pointed out that, as part of their active ageing programmes, they offered senior educational projects (among them: ten urban-rural, six rural) and promoted prophylaxis and health education (among them: ten urban-rural, five rural and one urban).

Only one municipality pointed to time bank as a method of encouragement of active ageing (urban-rural municipality). Also, retraining programmes for 50+ persons and occupational counselling were indicated by one municipality each (one urban-rural and one urban). Only two municipalities mentioned workshop and training in active job search techniques for people aged 50 and over (both urban-rural), and three municipalities pointed to the development of the social economy

Table 3. The activities performed by the municipalities for people aged 50+ – category of development of seniors' digital literacy

The activities performed by the local self-governments	The number (and percentage) of municipalities which declare activities	Municipalities		
		urban	urban-rural	rural
courses and training in the use of computer hardware	29 (78%)	2	19	8
the establishment of Internet cafés	9 (23%)	1	5	3

Source: Own study based on survey results.

sector (one urban and two urban-rural). The following activities enjoyed limited popularity:

- motivational and therapeutic workshop for people aged 50 and over (five municipalities, among them: three urban-rural and two rural),
- promotion of and support for senior volunteering (seven municipalities, among them: six urban-rural and one rural).

None of the surveyed municipalities has programmes in place of formal confirmation of qualification for the elderly, but, and this is positive, none of them reported that they were taking no action at all for the promotion of active ageing among 50+ persons.

The second most frequently indicated category of initiatives undertaken by the surveyed municipalities is the development of seniors' digital literacy (Table 3).

Among the less popular proposals, there are: courses and training in the use of mobile phones, tablets and other digital media (declared by five municipalities or 13%, among them: four urban-rural and one urban). It is worth noting that as many as 15% of the surveyed municipalities (six) report no initiatives in this area.

Table 4. The activities performed by the municipalities for people aged 50+ – category of improvement of accessibility of products and services for seniors

The activities performed by the local self-governments	The number (and percentage) of municipalities which declare activities	Municipalities		
		urban	urban-rural	rural
cooperation with various entities with a view to solving seniors' problems	24 (60%)	1	15	8
discounts for seniors	18 (45%)	2	11	5
adaptation of the municipal website to seniors' needs ⁶	17 (43%)	1	7	9
establishing facilities for seniors	14 (35%)	2	8	4
adaptation of the municipal office infrastructure to seniors' needs	14 (35%)	0	7	7
the improvement of the quality of services for seniors	11 (28%)	0	5	6
introduction of new services intended for seniors	10 (25%)	1	2	7

Source: Own study based on survey results.

⁶ Such a low percentage of indications comes as a surprise because it means that some residents, for example, visually impaired persons or the elderly are excluded from access to information.

Better access to products and services intended for seniors is the third most frequent category of initiatives undertaken by local self-governments in diverse ways (Table 4).

Less popular initiatives in this area concerned: senior-sensitive design (23% or 9 municipalities, among them: three urban-rural, six rural), adaptation of information transfer to the needs of seniors (20% or eight municipalities, among them: four urban-rural, two rural and one urban). Two municipalities, i.e. 5% (one urban-rural and one rural) admitted that they had not taken any measures in this respect; single municipalities supported the accessibility of health programmes, e.g. concerning mobility rehabilitation.

Less popular activities addressed the improvement of the quality of products and services for seniors. Such activities are most homogeneous as they basically cover improvements to some existing products and services so that they satisfy the needs of elderly people (83% of the surveyed municipalities declared having attempted such initiatives; this is 33 local self-governments, among them: 16 urban-rural, 15 rural and two urban). As many as 17% of the surveyed municipalities (that is seven, among them: four urban-rural and three rural) admitted no action in this area. This is doubtful because public services are at the core of any local self-government's activities, and seniors are a growing group of citizens using such services.

As regards age management⁶ in municipal offices and subordinate units, the following activities were reported as the most frequent: maintaining employment of seniors who want to keep working (60% or 24 municipalities, among them: ten urban-rural, 12 rural and two urban), parties/events integrating all generations of employees (48% or 19 municipalities, among them: ten urban-rural, seven rural and two urban), non-discriminatory senior recruitment procedures (45% or 18 municipalities, among them: ten urban-rural, seven rural and one urban), development of competence and qualification of 50+ persons (40% or 16 municipalities, among them: nine urban-rural, six rural and one urban). Five of the surveyed municipalities (that is 13%, among them: three urban-rural and two rural) admitted not having taken any action in this area. Individual local self-governments undertake initiatives such as: educational campaigns (two urban-rural municipalities), development of senior volunteering (two municipalities: one urban-rural and one rural), mentoring and tutoring programmes (two rural municipalities) and flexible forms of employment intended for seniors (three municipalities: one urban-rural and one rural).

Based on the data returned in the surveys, the level and intensity of activities conducted by local self-governments for people aged 50 and over can be said to run unevenly across the surveyed municipalities. Therefore, the survey asked, "Has the municipality been appreciated for its activities for seniors?". Five municipalities answered this question in the affirmative (12.5%, one urban, two rural and two urban-rural). At the same time, eight municipalities were able to identify the regional leaders of pro-senior initiatives: Opole, Kędzierzyn-Koźle, Gogolin, Kluczbork, and Prudnik.

⁶ The survey stated that, "age management puts emphasis on employees' age diversity as an important factor in the development of the organization."

The vast majority of the surveyed municipalities set up their initiatives independently (88% or 35 municipalities), and pro-senior partnerships are less popular (public-private: 23% or 9 municipalities and public-social: 18% or seven municipalities).

Conclusion

Facing major development barriers attributed to the adverse demographic situation, Opolskie Voivodeship has established a Special Demographic Zone (covering the entire region). The pilot initiative, Opolskie for the Family: a Special Demographic Zone Programme for Opolskie Voivodeship until 2020, allows for many innovative activities concerning: the labour market, improvement of living conditions in the region, as well as broadly understood active ageing. One of the four thematic packages of the Programme is intended for people aged 50 and over, and its implementation should encourage the professional, movement, cultural, and educational engagement of seniors. The conducted survey (with 56% of the region's municipalities participating, which offers a fair picture of the overall situation) clearly indicates that social problems (including demographic challenges) are ranked among the main development barriers. Recognizing the problem of depopulation and ageing of the population, the local municipalities launch many initiatives for people aged 50+, especially in the area of promotion of active ageing. Among the municipal activities for people aged 50 and over, those pursued by the local self-governments independently are in the majority (and it is alarming that the business sector is seen as the least desirable partner); they also fit into a fairly general framework (practically implementable in any municipality), thus being relatively easy to fund from external sources. There are few activities encouraging intergenerational education or the strengthening of social capital, that is, those that stem from the local attributes and characteristics of the area. Initiatives leading to profound and real stimulation of active ageing among 50+ people (e.g. time banks, volunteering, mentoring, tutoring) are rare and are undertaken by few local governments.

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