
Age Diversity Management – Conceptual and Application Approach

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Abstract:

Purpose: The main aim of the article is to present the concept of diversity management due to age and selected results of own research on this idea. The choice of the area of interest results from the fact that over the last several decades, both the population and the labor force are aging. Such a situation may lead to a reduction in the total number of people employed, investments through a decrease in savings, and an increase in pressure on the pension system and the state budget.

Design/Methodology/Approach: 63 SMEs from the Poznań powiat of the Wielkopolska voivodship, operating in a strictly defined industry, participated in the study. In addition, enterprises should employ a minimum of 5 people up to 50 and a minimum of 5 over 50 years of age. The survey was carried out using the CATI and PAPI methods.

Findings: Based on the survey, it can be indicated that most SMEs in the analyzed area do not have an age management system in place, but their operation takes into account the needs of older people.

Practical Implications: It is extremely important to encourage enterprises through training and funding to implement an age management system, especially when a selected group of respondents (people 50+) indicate numerous practical benefits for the employee, company, economy, and society.

Originality/Value: The originality of the work is to check to what extent the surveyed SMEs, although informally (in the form of procedures), consider the needs of older people in the basic areas of the concept of age management. The article also indicates how actions can be improved on those issues where respondents considered the efforts of business owners to be insufficient.

Keywords: Age management, age diversity, demographic crisis.

JEL Classification: J14, M12.

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1. Introduction

Many researchers point to three "great revolutions" in human history since the eighteenth century. The first - industrial, the second related to internationalization, and then the globalization of business, and the third - characterized by radical changes in demographic processes. In the latter area, these transformations were initially identified with a dynamic population growth, which was associated with the threat of limiting living space, impoverishment of the population, depletion of natural resources, and environmental degradation (Jurek, 2012). Currently, however, its second face is observed, related to the so-called "Graying of societies".

According to the estimates of the World Health Organization, since 1995, a million people have been growing globally every month, who are at least 60 years of age, and their total number will amount to 1.2 billion in 2025 and 2 billion in 2050 (WHO, 2012). In the territory of Poland, according to the forecasts of the Central Statistical Office, the share of people 65+ in the total population will increase from 18.9% in 2020 to 32.7% in 2050 (GUS, 2014).

The aging process of the population, with a low fertility rate observed at the same time, has been for over twenty years in the group of the most important phenomena that strongly shape the labor market in the European Union countries (Jurek, 2012; Thalassinos *et al.*, 2019). The concentration of attention results, inter alia, from fear of a reduction in the labor force, continuity of economic growth, collapse of pension systems (Urbaniak *et al.*, 2015). Moreover, the often-pejorative perception of old age, numerous stereotypes about the elderly, treating their role and competences in the category of "deficit" do not give an opportunity to increase the professional activity of seniors. Worse treatment of the elderly affects their further development opportunities and determines their quality of life. In the case of our country, it is particularly dangerous, because at present Polish seniors are one of the least economically active groups in the EU.

Therefore, there is an urgent need to change the approach to the elderly, as well as to implement such measures in enterprises that will effectively strengthen the position of seniors on the labor market. Such activities perfectly fit into the concept of managing diversity due to age. Therefore, the first part of the article presents the situation of older people in the labor market and introduces the above-mentioned idea. The next part presents the results of research on age management among SMEs located in the Poznań poviat.

2. Characteristics of the Labor Market of Seniors in Poland

There is no question that the production volume is determined, inter alia, by the size of the labor force and its quality, work efficiency and the level of professional activity (Jurek, 2012). Therefore, these elements closely influence the economic growth of each country in the long run. As Sauvey warned in 1948, "in populations experiencing the demographic aging process, the basis of capitalism, that is, the entrepreneurial spirit and

the propensity to take risks, is disappearing, and they are replaced by a new feeling: the desire for security" (Sauvey, 1948).

Aging populations will have a negative impact on the projected GDP growth in countries after 2020. According to the EU forecasts, one should expect even an average annual decline of 1.2 pp. (Guarino, 2018).

At the beginning, let us note that the professional activity rate in Poland, although it has undoubtedly increased over the last few years, in 2020 in each of the analyzed age groups, i.e., 55-59, 60-64 and 65+, was lower than the average value for European Union, as presented below.

Table 1. Economic activity rate for Poland and the EU27, 2020

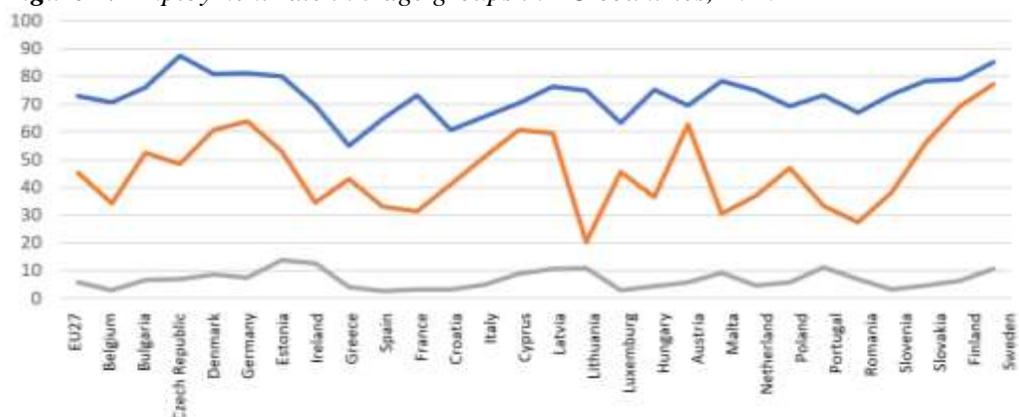
Age range	Poland	UE 27
55–59	70,8	76,9
60–64	37,7	47,8
More than 65	5,7	5,8

Source: Eurostat, 2019a.

And so, the analyzed measure for the first age group is 70.8 and it is about 6 pp lower than the EU27 average. Poland is in the group of countries with the lowest value, next to Greece (63.2%), Croatia (63.7%), Luxembourg (66.2%) and Romania (69.3%). The undisputed leaders for the 55-59 age group are the Czech Republic (89.5%) and Sweden (90.7%). When analyzing the range of the years 60-64, one can also indicate a lower level of the economic activity rate, which is as much as 10 percentage points in relation to the EU average. In the entire EU, its highest level was recorded in Sweden (73.1%), Estonia (67.9%) and the Netherlands (64.8%).

Poland, in turn, achieved a better result only compared to countries such as Belgium (35.7%), France (35.5%), Romania (34.5%), Austria (31.6%), Croatia (32, 7%) and Slovenia (28.5%). In turn, the value of this measure for people 65+ is 5.7% and is close to the EU average (Eurostat, 2019b) (Figure 1).

Figure 1. Employment rate in 3 age groups in EU countries, 2020



Source: Eurostat, 2019b.

Considering the employment rate, it can be concluded that for people aged 55-59, 60-64 and 65 + it was characterized by a growing tendency over the years 2010-2019 (only for the period 2012-2015 this indicator did not change in the group of 65+) (Eurostat, 2019b). Currently, for the age group 55-59, our country does not achieve the EU average of 72.9%.

We are in the infamous group with the lowest values of this measure. Only countries such as Greece (55.1%), Croatia (60.6%), Spain (64.8%), Italy (65.5%) and Romania (66.9%) perform worse than Poland. For the age group 60-64, our country is lower by 8 pp than the EU average amounting to 45.3%. In turn, for the last age range, the level of the indicator is 5.7% for Poland, the same as for the EU27 (Eurostat, 2019b). The characteristics for the 27 EU countries in three age groups are presented in the chart below.

The quoted statistical data prove the lower involvement of older people in the labor market. Undoubtedly, with age, it becomes more and more difficult for older people to find a job or even change it. Such a situation is determined by factors of various nature, i.e., health, psychological and social factors. There is no question, however, that in view of the disturbing demographic forecasts, business owners will have to revise the way they do business, including the methods of human resource management.

3. Age Diversity Management

Researchers representing various fields of science unanimously state that in the face of the aging of the productive population - it becomes necessary to use the "older" workforce. "In order to run a business efficiently [entrepreneurs] must increasingly use the potential of older workers" (Jurek, 2012). Moreover, Łukasz Jurek adds that "economic transformations have widened the professional space in which the usefulness of the features represented by the elderly is relatively high. People started noticing not only their disadvantages, but also advantages" (Jurek, 2012).

Therefore, in many developed countries the concept of age management is becoming more and more popular, which is treated as an important element of human resources policy implemented in enterprises. This concept is treated as a specific aspect of diversity management, with age being a special feature that differentiates employees. Therefore, age management in this case is expressed by carrying out "within the organization activities adapted to the preferences, needs and capabilities of employees of different ages, which allow rational and effective use of the human resources potential of the organization" (Liwiński and Sztanderska, 2013).

It is worth emphasizing that this way of defining means that the idea is directed at all employees, so it does not focus only on the elderly. Enterprises should carry out preventive measures spread over the entire period of the employee's professional career (the so-called life course approach) due to their long-term impact on the ability to perform professional work through, inter alia, promoting health, preventing various diseases, organizing training, and retrofitting workplaces (Liwiński and Sztanderska, 2013).

However – what is crucial – in the face of the demographic crisis, the concentration of attention in an enterprise, especially on people aged 50+, cannot have a pejorative or discriminatory connotation against younger people. It is aimed at increasing the economic activity of older people and a fuller use of the potential of employees who are still active on the labor market despite their older age (IBnDiPP, 2013). As J. Osiecka-Chojnacka justifies, "the functioning of aging people in the labor market and their longest activity depends on the extent to which their professional potential is used and on whether they receive support in matters in which they need help or training" (Osiecka-Chojnacka, 2012).

Let us add here that researchers in gerontology indicate three main groups of benefits from the implementation of age management. On a micro scale - for enterprises in the form of, inter alia, maintaining competences at an appropriate level, maintaining the continuity of the company, taking advantage of the age diversity of its employees, increasing work efficiency, reducing the costs of human resource management, or improving the competitive position of the company. In addition, on an individual basis, the benefits for the elderly include, inter alia, maintenance: employment at least until the statutory retirement age, job satisfaction and satisfaction, financial situation, and life.

The third group of benefits of a social nature indicates, inter alia, to maintain or even increase the resource of economically active people, protect the pension system and public finances against collapse, avert the threat of tax increases and reduce age discrimination during employment (IBnDiPP, 2013).

In order to implement the idea of age management into management practice, it turns out that it is necessary to carry out activities aimed at increasing work efficiency through, inter alia, planning employment and recruiting new employees, training and marking a career path, designing a job and internal transfer between positions, implementing flexible forms of employment and modernizing work, protecting and promoting health, as well as termination of employment and retirement (Łojkowska and Kędziora, 2010).

4. Age Diversity Management in SMEs in a Selected Poviát in Wielkopolska Voivodship

4.1 Research Framework

As part of the project implemented in the period 2020-2021 entitled "Managing the age diversity of employees in small and medium-sized enterprises from Wielkopolska", a study was conducted among small (employment in the range of 10-49 people) and medium-sized (employment in the range of 50-249 people) enterprises from the Poznań poviát.

The basic research problem was to recognize the degree to which these entities consider the problem of diversity in terms of age in the management of the intellectual capital of the enterprise. The area of interest includes the elderly due to the progressing demographic processes, competency shortages, age discrimination, as well as numerous stereotypes regarding old age affecting the functioning of the labor market.

The selection of enterprises constituting the research population was deliberate. The criteria for this selection were:

- 1) location (Poznań powiat);
- 2) total number of employees (with distinction for small and medium-sized entities);
- 3) section C – manufacturing (according to PKD 2007);
- 4) simultaneous employment of a minimum of 5 people up to 50 years of age and a minimum of 5 people over 50 years of age.

The selection of research criteria resulted from at least several reasons. Firstly, SMEs are the most numerous group of enterprises in the Poznań powiat (just outside the city of Poznań) (SWW, 2020), hence their condition and prospects for further development to the greatest extent reflect the potential of entrepreneurship and innovation, and thus competitiveness. Secondly, these entities also feel the most barriers in conducting their activities. On the other hand, the choice of the spatial scope was not accidental and resulted from at least several premises:

1. The Poznań powiat is characterized by the highest population not only in the Greater Poland Voivodeship, but also in the entire country - it is inhabited by about 399,272 inhabitants (as of December 31, 2020) (GUS, 2020a);
2. Poznań powiat is characterized by the highest number of people in the immobile age (45-59 / 64), i.e., 86,268 people (GUS, 2020b);
3. Poznań powiat is distinguished by the largest number of unemployed aged 55-59 (12.7%) and aged 60+ (8.2%) (PUP, 2019);
4. the demographic old age rate for the Poznań powiat is 13.1% (one of the highest in the voivodship) (USwP, 2020a);
5. Poznań powiat ranks second in terms of the number of entities entered in the REGON register out of 10,000. population in Wielkopolska in 2019 (USwP, 2020b);

Based on data obtained from the statistical office and their corrections by research assumptions, a group of 408 entities was distinguished. The study was complete for a given population. Ultimately, 63 entities agreed to participate in the study (using CATI and PAPI techniques), of which 40 were small and 23 medium-sized enterprises. The basic research tool was an interview questionnaire consisting of 24 questions. The actual stage of the project was preceded by a pilot, which allowed to refine the research questions. Conducting research, and, consequently, analyzes, also required terminological arrangements, e.g., in the set of the following terms, age, younger person, older person, equality, diversity, age diversity management, ageism, stereotype.

4.2 Selected Research Results – Perspective of Elderly Citizens

One of the basic premises of the study was the statement that the level of implementation of the concept of age diversity management is not sufficient in Polish enterprises, and a significant part of the activities undertaken is only of an image-related nature. For this reason, the interview questionnaire asked whether the age-based diversity management system is not only implemented in the enterprise, but also fully implemented. And so, only fifteen 50+ respondents answered positively to this question, of which 10 indicated

that it is fully implemented, and five that it is purely image-related, and its basic guidelines are not followed.

However, what is worth paying attention to, despite the lack of written systems (in over 76% of companies), the respondents indicated, however, that the owners of enterprises consider their needs in the workplace. Such a conclusion is possible based on the questions contained in the interview questionnaire, which were based on the age management model proposed by Jaworska (2010). The areas analyzed and the premises, along with the questions and answers, are presented below.

Table 2. Selected areas of age management

Activities in the enterprise	Premise	Interview question	Number of answers			
			YES	NO		
organization of work	there is a need to introduce innovative forms of work organization in enterprises in order to retain valuable employees and ensure their effective performance of activities;	Does the enterprise use flexible forms of work organization (e.g. mobile, remote work, etc.)?	YES	46		
			NO	17		
		Does the enterprise delegate an employee to help an elderly person?	YES	22		
			NO	41		
		Does the enterprise agree to work part-time?	YES	26		
			NO	37		
raising qualifications and knowledge transfer	job security depends on skills and less on the statutory level of employment protection;	Does the enterprise invest in lifelong learning and training (basic or advanced)?	YES	47		
			NO	16		
		Does the company care about the transfer of knowledge between younger and older employees?	YES	51		
			NO	12		
		taking care of yourself and your health, increasing the availability of care services	deteriorating health condition reduces the employment rate in many countries;	Does the company offer its employees free of charge or partially finance preventive examinations?	YES	38
					NO	25
Does the company organize sports activities to improve its physical fitness?	YES			22		
	NO			41		
Does the enterprise use the so-called mixed teams?	YES			22		
	NO			41		
Does the company care about the ergonomics of the workplace?	YES	45				
	NO	18				
elimination of negative attitudes to work	work strongly determines mental well-being, social and financial well-being, low job satisfaction or inappropriate treatment on the part	Does the company organize integration meetings?	YES	42		
			NO	21		
		Does the company perceive and prevent age discrimination?	YES	39		
			NO	24		

	of management and employees reduces productivity;			
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Source: Own work.

On the basis of the above list, several conclusions can be drawn. Firstly, in the analyzed enterprises in the area of "work organization", 50+ respondents have the opportunity to use flexible forms of work organization, and - importantly - in the case of difficulties encountered while performing their official duties - the employer engages another employee to help. Such action can strengthen intergenerational cooperation by ensuring faster and more effective transfer of knowledge, skills, and experience. In addition, it can have a positive effect on trust in superiors. Unfortunately, as indicated by the analyzed group of respondents, in most of the surveyed enterprises there is no possibility of part-time work (this applies to 59% of companies).

Secondly, when analyzing the area of "improving qualifications and transfer of knowledge", positive actions of enterprises in terms of improving the qualifications of employees are noticed. The possibility of training is confirmed by 75% of respondents 50+, and the care of business owners to transfer knowledge between the younger and the older generation is confirmed by as many as 80% of them. This situation is optimistic, as it emphasizes that SMEs perceive the importance of courses, training, etc. in building and strengthening their competitive position on the market, despite the undoubted costs of investing in this form of education.

Moreover, this proves that the analyzed enterprises make efforts not to discriminate against people aged 50+, and thus to train only younger employees. As rightly noted by Schimanek, Kotzian and Arczewska (2016), "the employer, enabling the professional development of employees, should be guided by the criteria of their knowledge and competence, not age" (Schimanek *et al.*, 2016). The undoubted advantages of this approach include, from the employer's point of view, the adaptation of employees' competences to the employer's needs, greater chances of keeping mature employees in the company. On the other hand, from the point of view of 50+ employees, it is necessary to mention a higher motivation to undertake development activities, strengthening self-esteem or a sense of employment stability. (Schimanek *et al.*, 2016).

Thirdly, it can be noted that in the matter of "taking care of yourself and your health, increasing the availability of care services", two out of three companies offer free or partially paid preventive examinations to employees. This is important from the point of view of old age, as it is health problems that are one of the most common reasons for employees leaving the labor market (Schimanek *et al.*, 2016). Moreover, Polish workers leave this market faster than the average European, and according to forecasts, in 2070 it will be 3 years earlier than in other EU27 countries (Eurostat, 2019c).

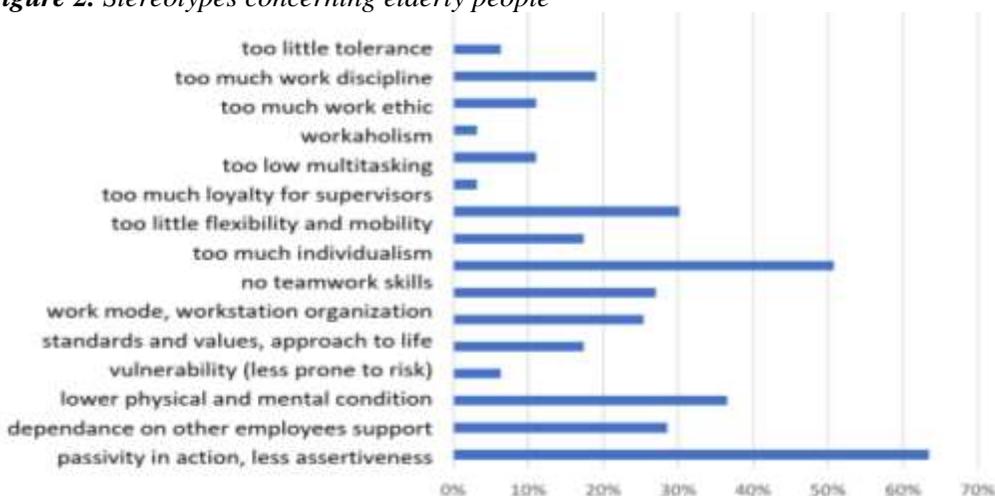
In addition, as many as 71% of respondents 50+ confirm the company's care for the ergonomics of the workplace, and thus its adaptation to the physical and mental characteristics of the employed person. There is no question that "the conditions in which a person works may not lead to a deterioration of his health, e.g., due to inadequate

lighting, the need to carry heavy loads or maintain an incorrect body posture for a long time" (Schimanek *et al.*, 2016). Such adjustment may contribute to an increase in productivity and efficiency of operations, as well as the comfort of the work performed. Unfortunately, now the interest of business owners in sports activities increasing physical fitness is low. However, it is widely recognized that promoting physical activity in a company is so-called "Good practice", worth implementing. Improving the health condition of employees may reduce the costs of sickness absenteeism. Unfortunately, now, according to Eurostat data, Poles aged 20-64 belong to the group characterized by one of the highest sickness absences during the working week in the entire EU27 (Eurostat, 2019d).

Importantly, 65% of older respondents negatively answered the question about organizing the so-called mixed teams for a longer period. This state of affairs does not fill us with optimism, as it is commonly accepted that through such practices both knowledge and experience are transferred, and intergenerational relations are strengthened. What's more, "teams of different age are also a guarantee of a smooth exchange of personnel and enriching the know-how in the company. In this way, the employer avoids the risk of a competency gap if in the past he employed people of the same age who would start to retire at a similar time. In diverse teams, the turnover is usually lower because mature employees value stability and are therefore more attached to the workplace" (Schimanek *et al.*, 2016).

Fourth, in the area of "elimination of negative attitudes to work", it is noticed that companies organize integration meetings aimed at building and strengthening relationships. It is worth adding here that 33 respondents take part "very often" and 25 "often". It is also worth noting that 62% of respondents notice the company's activities aimed at counteracting age discrimination. This is particularly important in a situation where almost 73% of respondents 50+ claim that stereotypes about old age are reproduced in enterprises. The answers of the respondents concerning unfair opinions are presented below (possibility of multiple choice) (Figure 2).

Figure 2. Stereotypes concerning elderly people



Source: Own work.

Figure 2 shows that the most common existence in enterprises, as well as the duplication of stereotypes by company employees regarding: passivity in action, less assertiveness and creativity (63%), too much individualism (51%) and weakened physical and mental condition (37 %).

It is also worth emphasizing here that the 50+ employees themselves are increasingly aware of the demographic challenges faced by business owners. Therefore, they expect managers to focus their attention on issues related to age management, and thus treat age as a feature that is a specific opportunity for the development of the enterprise, and not as a problem that needs to be eliminated.

Therefore, respondents aged 50+ indicated numerous benefits of age management for themselves. Among them, three are dominant, i.e., limiting the intergenerational conflict (better atmosphere at work) ($m_e = 5$, $d = 5$, $\bar{x} = 4.44$), intergenerational transfer of knowledge ($m_e = 4$, $d = 5$, $\bar{x} = 4.25$) and an increase in satisfaction with life and work ($m_e = 5$, $d = 4$, $\bar{x} = 4.68$). In turn, the group of benefits that can be obtained by the enterprise includes reduction of the loss of capital of knowledge, skills and experience of employees ($m_e = 4$, $d = 4$, $\bar{x} = 4.15$), improvement of the company's image in the eyes of the client ($m_e = 4$, $d = 4$, $\bar{x} = 4.14$) and improvement of the company's competitive position ($m_e = 4$, $d = 4$, $\bar{x} = 4.07$).

5. Conclusion

The contemporary, globalized world is struggling with many problems, and thus facing many challenges. They are economic or ecological. More and more often, the issue of demographic changes taking place and having irreversible consequences is raised in the sphere of interest of scientists, states, or international organizations. First, we are talking about the aging of societies, and thus also of the labor force, with an unsatisfactorily low level of fertility rates.

Soon, especially in highly developed countries, there is a risk of a collapse of the labor market and the pension system, as well as a decreasing percentage of socially and publicly active people. In this situation – as Urbaniak and others aptly noticed - “the competitiveness of economies will be determined by [...], inter alia, whether and how they react to negative demographic trends. Only those economies that quickly and actively take appropriate action will deserve the title of the most competitive world economies” (Urbaniak *et al.*, 2015). Therefore, entrepreneurs are expected to be highly flexible and quickly adapt to the changes taking place.

This adaptation can be seen, among others by focusing on the concept of age management in enterprises. This idea represents a modern approach to personnel management of various ages, emphasizing that the company should implement adaptation measures to the needs, preferences, or capabilities of employees of various age groups. Unfortunately, it is still not very widespread in Poland. This is also confirmed by the results of research on SMEs in the Poznań powiat, where only 15 entities had it implemented, and only 10 were fully implemented. On the other hand – which should be emphasized – 77% of enterprises notice that the diversity in terms of age alone brings both benefits and losses,

which proves a high awareness of both the ongoing demographic changes and the need to take into account the issue of age in enterprise management.

Moreover, even though the vast majority of enterprises do not have an implemented system, some of its elements are implemented in them. In the basic areas of age management, despite the lack of its implementation, 50+ employees point to the company's care for satisfying their needs. In two areas, it is worth making more efforts. And so, in the area of "work organization", it would be worth identifying positions and tasks that an older employee could perform for a shorter period, e.g., for a few days a week at the rate set at the time of employment. Of course, it should also be borne in mind that it is strongly dependent on the type of professional tasks performed (e.g., availability in contact with the client or production phases), and in small enterprises it may lead to disruption of other people's work.

Similarly, in the area of 'taking care of your own health', it is advisable, if possible, to establish lists of tasks in advance that can be performed jointly by the younger and older workforce. It is also worth identifying, for example, heavy physical work that could be outsourced to younger workers with better physical and health condition. In turn, as part of the integration, companies could organize sports activities, e.g., volleyball games, outdoor aerobics, which do not generate significant costs.

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