

**SUMMARY OF PROFESSIONAL ACCOMPLISHMENTS**

**1. Name and Family name: Jolanta Perek-Białas**

**2. Certificates, titles - name, place and year of obtaining the title, title of PhD thesis**

1996 - obtained the Master of Arts title (with honours), Institute of Statistics and Demographics - Warsaw School of Economics

2001 - obtained a PhD in Economic Studies at Collegium of Economic Analysis - Warsaw School of Economics (PhD thesis title: "Propensity to Save in Polish Households in the Aspect of Securing Oneself for Old Age", thesis supervisor: prof. dr hab. Małgorzata Rószkiewicz (reviewers: prof. dr hab. Teresa Słaby, prof. dr hab. Stefan Mynarski)

**3. Information about employment in academic/research institutions:**

From 1<sup>st</sup> October 1996 - on-going - assistant professor at the Institute of Statistics and Demographics, Collegium of Economic Analysis - Warsaw School of Economics (full time), in the years 2001-2007 part time

From 1<sup>st</sup> February 2001 - on-going - assistant professor at the Institute of Sociology of the Jagiellonian University (part time), in the years 2001-2007 full time

1997 - 1998 - analyst (amongst others: covering the use of data from household budgets) in the Ministry of Labour and Social Policy

1995 - 1996 - assistant - trainee at the Warsaw School of Economics, Institute of Statistics and Demographics

**4. List of achievements as basis for evaluation based on article 16 of 2<sup>nd</sup> part of law act from 14<sup>th</sup> of march 2003 on academic titles (in Polish: Dz. U. nr 65, poz. 595 ze zm.):**

**Jointly prepared papers in journals from JCR list of ERIH:**

1.1	Active ageing policies in the Czech Republic and Poland	International Social Science Journal 58 (190), 2006, 559-570 <a href="http://doi:10.1111/j.1468-2451.2008.00655.x">http://doi:10.1111/j.1468-2451.2008.00655.x</a>	Jolanta Perek-Białas (33,3%), Anna Ruzik, Lucie Vidovičová
1.2	Older Women in Central and Eastern	in: Women and Aging International: Diversity,	Jolanta Perek-Białas (80%), Lee Ann

	<b>Europe: Economic and Health Concerns</b>	Challenges and Contributions, edited by Lee Ann Mjelde-Mossey, Ph.D. and Iris Chi, DSW, 2012, Taylor and Francis Group, London and New York, pp. 66-79. [This re-publication of a Special Issue of the Journal of Ethnic & Cultural Diversity In Social Work, vol. 19, issue 4, <a href="http://www.routledge.com/books/details/9780415695428/">http://www.routledge.com/books/details/9780415695428/</a>	Mjelde-Mossey
1.3	<b>Organisation-level policy towards older workers in Poland</b>	International Journal of Social Welfare, 2012, 21: S101-S116; <a href="http://dx.doi.org/10.1111/j.1468-2397.2012.00878.x">http://dx.doi.org/10.1111/j.1468-2397.2012.00878.x</a>	Jolanta Perek-Białas (50%), Konrad Turek (50%)
1.4	<b>Volunteering in older age: an organizational perspective</b>	International Journal of Manpower, 2012, Vol. 33 Iss: 6, pp.685 - 703, <a href="http://dx.doi.org/10.1108/01437721211261822">http://dx.doi.org/10.1108/01437721211261822</a>	Andrea Principi, Robert Lindley, Jolanta Perek-Białas (10%), Konrad Turek
1.5	<b>The role of employers opinions about skills and productivity of older workers: example of Poland</b>	Employee Relations, 2013, Vol. 35 Iss: 6, pp. 648 - 664, <a href="http://dx.doi.org/10.1108/ER-04-2013-0039">http://dx.doi.org/10.1108/ER-04-2013-0039</a>	Konrad Turek (70%), Jolanta Perek-Białas (30%)
1.6	<b>Working Carers in Poland - Successful Strategies of Reconciliation of Work and Care of an Older Adult</b>	Antropological Notebook, April 2014, 20(1), 87-104, <a href="http://www.drustvo-antropologov.si/AN/2014_1.html">http://www.drustvo-antropologov.si/AN/2014_1.html</a>	Justyna Stypińska (60%), Jolanta Perek-Białas (40%)

### Jointly prepared chapters in publication in international Publishers<sup>1</sup>

3.1	Did the transition to a market economy and the EU membership have an impact on active ageing policy in Poland?	'The Making of Aging Policy: Theory and Practice in Europe', editors R. Ervik, T. S. Linden	Anna Ruzik-Sierdzińska, Jolanta Perek-Białas (30%), Konrad Turek	Edward Elgar Publishing, 2013, pp.124-147
3.5	Voluntary organizations' policies towards older volunteers across European countries	Active ageing: Voluntary work by older people in Europe, Editors: Andrea Principi, Per H. Jensen and Giovanni Lamura	Andrea Principi, Jolanta Perek-Białas (40%)	The Policy Press, University of Bristol 2014, pp. 245-274.
3.6	Economic gerontology: Older people as Consumers and Workers	Old Age in Europe. A textbook of gerontology, edited by Kathrin Komp & Marja Aartsen	Jolanta Perek-Białas (75%), Joop Schippers	Springer Briefs in Aging, 2013, pp. 79-96

<sup>1</sup> The number of listed publications is the same as in the Attachment where all publications (these for review and others) are listed.

3.7	The Attitudes towards Retirement with Preferences About Savings for Old Age - The case of Poland	Economy in Changing Society: Consumption, Markets, Organizations and Social Policies (red. Maria Nawojczyk)	Jolanta Perek-Białas (50%), Małgorzata Rószkiewicz	Cambridge Scholars Publishing, Newcastle upon Tyne, UK, 2011, pp. 319 - 340.
3.8	Transformation of elderly care in Poland	(w): León, Marga (2014) (ed), The transformation of care in European Societies	Jolanta Perek-Białas (50%), Mariola Raclaw	Palgrave Macmilian, Hampshire, UK, 2014, 256-275

2.1	Population ageing in Central Eastern Europe	Some Socio-economic Consequences of Population Ageing in Selected Central and Eastern European Countries	Budapest, Visegrad Fund, Hungarian Academy of Science, 2012, <a href="http://www.maltai.hu/data/Challenges of Aging Societies.pdf">http://www.maltai.hu/data/Challenges of Aging Societies.pdf</a>
2.2	Active ageing policy	Possibilities and limitations of active ageing policy - information about international scientific project [in Polish]	STUDIA DEMOGRAFICZNE, Polska Akademia Nauk, Komitet Nauk Demograficznych, 2004, pp.:105-110.
2.3	Economic situation of older generation in countries of Central and Eastern Europe	Possibilities of analysis of material situation of older households in Central and Eastern Europe [in Polish]	Wiadomości Statystyczne, Nr 12, 2012, ss. 53-61
2.4		Material deprivation of older households in selected countries of Central and Eastern Europe	Acta Universitatis Lodziensis, Folia Oeconomica, 2013, nr 291, pt.: Starzenie się ludności między demografią a polityka społeczną, pod redakcją D. Kałuży-Kopias i P. Szukalskiego, nr ISSN 0208-6018, s. 293-304
2.5		Socio-economic situations of older generations in selected countries of Central and Eastern Europe based on EU-SILC - analysis of the material deprivation	Research Methods and Techniques in Economic and Social Sciences, Plovdiv University, Bulgaria, 2013, pp. 500-509
2.6	Labour market, preparing for economic activity and social participation	Active ageing in Poland - some issues with a relation to the labour market	in "Socially Unbalanced Europe. Socio-Political Proposals in Times of Crisis", edited by K. Busch, M. Flore, H. Kohl, H. Schlattermund, publication of the INSITO project, The Merlin Press, UK, 2011, ss. 186-196.
2.7		Defining and Evaluation of Civilization Competences among the Older and	in: Civilization Competences and Regional Development in Poland (ed. B. Liberda, A. Grochowska), Uniwersytet Warszawski, Warsaw, 2009, Vol.1, pp. 151-166

		<i>Younger Generations</i>	
2.8		<i>Civilization competences of older generation in comparison with younger - example of selected gminas in Poland [in Polish]</i>	[in]: Wellbeing and competences of individuals in local communities in Poland, edited by B. Liberda, Wydawnictwo Uniwersytetu Warszawskiego, Warszawa, 2011, pp. 147-164
2.9		<i>Situation of 50+ in Małopolska ; activity and exclusion [in Polish]</i>	[in]: Diagnoza rynku pracy i wykluczenia społecznego w Małopolsce. Refleksja nad wykorzystaniem wskaźników, pod red. J. Górniaka, S. Mazura, Małopolska Szkoła Administracji Publicznej Akademii Publicznej w Krakowie, 2007, ss. 153-188.
2.10		<i>Wsparcie edukacyjne grup szczególnego ryzyka-refleksje i rekomendacje</i>	[in]: Kształcenie przez całe życie: perspektywa Małopolski, red. J. Górniak, B. Worek, Wojewódzki Urząd Pracy, Kraków 2008
2.11		<i>Older Workers in the Labour Market and in Companies - an International Comparison</i>	DZA, Germany [only printed version]; <a href="http://www.konferenz-altersbilder.de/fileadmin/altersbilder/pdf/Konferenzdokumentation.pdf">http://www.konferenz-altersbilder.de/fileadmin/altersbilder/pdf/Konferenzdokumentation.pdf</a>
2.12	The care elderly	<i>The elderly care: society, state, market [in Polish]</i>	Ed: Anna Karwińska, Aleksander Surdej in: WOKÓŁ ZAGADNIENÍ GOPODARKI NIEORMALNEJ, Wydawnictwo Akademii Ekonomicznej w Krakowie, 2004, ss: 210-222
2.13		<i>The marketization of care services for older people in Poland - possibilities and limitations [in Polish]</i>	[in]: Publiczna troska, prywatna opieka. Społeczności lokalne wobec osób starszych, red. M. Raćław, 2011, ZUS I ISP, Warszawa, ss: 57-88.
2.14	Monitoring of older people situation - the role of social indicators	<i>The situation of older people in Central and Eastern European countries in the light of EUROSTAT indicators</i>	[in]: Międzynarodowa polityka społeczna - aspekty porównawcze, ed. B. Balcerzak-Paradowska, A. Rączaszek, Warszawa-Katowice 2010, Instytut Pracy i Spraw Socjalnych, Akademia Ekonomiczna w Katowicach, pp. 241-250.
2.15		<i>The thoughts about use of indicators of ageing population - new challenges, new Solutions [in Polish]</i>	in: Pomyślnie starzenie się w perspektywie nauk o pracy i polityce społecznej, ed. J.T. Kowaleski, P. Szukalski, Wyd. UŁ, Łódź, 2008, ss. 109-125.
2.16	The quality of life	<i>Population Aging in Europe: Lessons Drawn from EU-projects</i>	in: Population ageing. Towards an Improvement of the Quality of Life?, Research Center of the Flemish Government, Brussels, Belgium, 2009, pp. 181-226
2.17		<i>Quality of Life in Old Age in the Central and Eastern European countries</i>	PRACE NAUKOWE UNIwersytetu Ekonomicznego we Wrocławiu nr 308 (2013) "Quality of Life and Sustainable Development", ss: 113-127.

**Presentation of academic aim above publications and achieved results with presentation of their use**

The goal of this part of the document is to present my academic output. An integral part of this document is an attachment that has been prepared in such a way that the persons assessing my accomplishments would be able to refer to the entries of the said Law directly and review my achievements in the scientific and research fields accomplished after achieving my PhD.

First of all, I have indicated the areas of scientific fields where I focused my scientific work. Furthermore, the co-authorship of joint publications in the database of publications in the Web of Science, the Journal Citation Index and the European Reference Index for the Humanities is confirmed by my appropriate statements.

**Prior to PhD:**

The beginnings of my current scientific and research interests date back to my scholarship/visit at the International Institute of Applied System Analysis (1997), an international institute located in Laxenburg, Austria. I took part in the Young Scientists Summer School - YSSP, which lasted for 3 months. During my stay in Austria I dealt with analysis from the point of view of social and economic consequences of the old age pension reform planned to be introduced then in Poland. My scientific tutor was dr Landis MacKellar (co-operating with OECD, an author of publications in the field of old age pension economics). My stay at YSSP made me aware of many interdisciplinary issues and the need of taking into account numerous factors in models that are to foresee particular behaviour of households (in my case in the scope of saving towards old age). During my stay in Laxenburg I met dr Steven Ney, who later invited me to make an application for an international prestigious project as part of the 5<sup>th</sup> Framework Programme of the European Union. Although I was only at the phase of preparing my PhD focused on securing oneself for old age, we managed to win a grant of the European Commission and I became a Polish partner of an international project, which I co-ordinated in Poland in the years 1999-2002 and pertained to the policy of social security (including the pension system); in particular taking into account assessing the possibility and limitations of citizen

participation in creating policies connected with demographic changes (project: *Public Participation and the Pension Policy Process: The Citizen and Pension Reform* in Key Action: Socio-Economic Research, HPSE-CT-1999-00023). Prior to the PhD thesis defence I took part in the PHARE-ACE project (Action for Co-operation in the field of Economics): *Household Welfare and Behaviour during Transition in Bulgaria, Hungary and Poland*, University of Leicester, UK (1998-1999).

My stay at IIASA was rich in meetings that allowed me to see the importance of social conditions of economic processes. A meeting in Austria, with the later Nobel Prize in Economy (2005) awarded Prof. Thomas C. Schelling was of significant influence on the character of my research work. Owing to this, in 2004 (one year before the Professor was awarded the Nobel Prize), I organised a special lecture with his participation at the Jagiellonian University during which he shared critical reflections with the audience regarding rational behaviour of individuals and linking macro-economy with the analysis of human actions in micro scale (one of Prof. Schelling's books is entitled "Micromotives and Macrobehaviour").

Prior to my PhD, my publication activity - amongst others - focused on:

1. *Analiz zachowań konsumpcyjnych gospodarstw domowych* [The analysis of households' consumption behaviour] (Perek-Białas, J., M. Rószkiewicz, E. Czarnota, „Ocena efektywności instrumentów marketingowych na przykładzie finansowania zakupów dóbr trwałego użytku przez gospodarstwa domowe” [The evaluation of efficiency of marketing tools from the durable goods market]; „Marketing i Rynek”, nr 8-9/1996, Perek-Białas J., Rószkiewicz M., „Identyfikacja zachowań etnocentrycznych” [Identification of ethnocentrism behaviour], „Marketing i Rynek” Nr 8-9/98, PWE, pp. 2-4, Warszawa; J. Perek-Białas, „Próba klasyfikacji gospodarstw domowych dla potrzeb segmentacji wydatków na kulturę i turystykę” [The attempt of classification of households based on culture and tourism expenditures], in „Zastosowanie metod wielowymiarowych w badaniach segmentacji i selektywności rynku” [The application of multivariate methods in segmentation and selectivness of the market], Ed. S. Mynarskiego, Akademia Ekonomiczna w Krakowie, Kraków 1999, pp.73-83; J. Perek-Białas, „Określanie homogenicznych grup gospodarstw domowych ze względu na ich konsumpcję” [The identification of homogenous households based on their consumption patterns], *Wiadomości Statystyczne*, Nr 11/ 2000, pp.23-36);

2. *Analiz ubóstwa osób starszych* [The poverty of older people] (Perek-Białas J., Topińska I., „Ubóstwo emerytów i rencistów w Polsce”, „Wiadomości Statystyczne” Nr 10/98, GUS, pp. 19-24, Warszawa);

3. *Analiz dot. oszczędzania* [The analysis of saving] (Perek-Białas J., „Wiarygodny pomiar oszczędności oraz motywów oszczędzania w badaniach ankietowych”, in *Pomiar w badaniach rynkowych i marketingowych*, Ed. Marek Walesiak, Wyd. AE Wrocław, PN 856, 2000, pp. 60-68).

In November 2001 I defended my PhD thesis entitled “Propensity to Save in Polish Households in the Aspect of Securing Oneself for Old Age (Skłonność do oszczędzania polskich gospodarstw domowych w celu zabezpieczenia się na starość) prepared under the supervision of prof. dr hab. Małgorzata Rószkiewicz (reviewers: prof. dr hab. Stefan Mynarski and prof. dr hab. Teresa Słaby). In my PhD thesis I chiefly referred to the issue of securing oneself for old age (*precautionary saving behaviour*), which is widely analysed in economy. Although Keynes already referred to motivation in gathering assets, the subject is still inspiring for economists, also because of the analytical challenge connected with including psychological factors in the models (I then made an attempt to apply the Euler equation to estimate precautionary motivation in economic behaviour in Polish circumstances). An important publication from that period is a monograph written with the thesis supervisor prof. dr hab. M. Rószkiewicz entitled “Household Propensity to Save in Order to Secure Old Age Period (Skłonność gospodarstw domowych do oszczędzania w celu zabezpieczenia okresu starości). The said publication is the result of work realised as part of KBN grant No 1H 02F 00215, Warsaw 1999, p. 126; Edit. Pont Info, Warsaw.

#### **Post PhD period:**

The areas of research and analysis, which became the subject of my studies following my PhD, i.e. ageing and old age, corresponds with the scope of gerontology defined as the science dealing with social, psychological, economic and demographic processes and phenomena, which are the result or consequences of particular people or entire society ageing (see Szatur-Jaworska, Błędowski, Dziegielewska, 2006). Gerontology is the scientific study of the biological, psychological, and social aspects of ageing, born in the nineteenth century with the new science of senescence. Elie Metchnikoff in 1904 used the term ‘gerontology’, and in

1938 in *Problems of Ageing* Ed. E. V. Cowdry there was published the first interdisciplinary research in social gerontology (Achenbaum, 1996, see Quadagno, 2009). Social gerontology is subfield of gerontology and academics are concerned not only with the social aspects (sociology, economics, psychology, social and public policy), but also they look for answers how biological processes of ageing influence the social aspects of ageing. The research findings are used in the applied disciplines of social policy, social work, public policy and regional planning and in many others which support design and implementation of programmes and policies for ageing population (Quadagno, 2009, p. 4).

Population ageing (term used in demography) or society ageing (term accepted amongst sociologists) are the basis for all my analyses and studies. Thereby my work indicates socio-economic consequences of these processes and fall in line with the development of research in this scope. What is important, in the undertaken research I have used the interdisciplinarity of approaches, connecting aspects both associated with economy, statistics, demography as well as sociology, but also social policy or public policy analysis.

The scientific genre, which I chose to be leading in my scientific activity falls in line with the scope of studies called *ageing studies* or gerontology, which by definition is interdisciplinary and draws from the achievements of sociology, psychology, pedagogy, economics, demography, medicine and other fields. Although gerontology is present as an independent discipline internationally and is taught at many universities (the *Gerontologist* magazine has had a 3,279 Impact Factor for a period of 5 years), in Poland - in spite of the existence of the Polish Association of Gerontology (of which I am a member and partake in congresses of the International Association of Gerontology and Geriatrics (IAGG) and the European counterpart of the said Association) - there is not yet a possibility of gaining a scientific degree in this field.

By presenting my output, I would like to show that both in the theoretical, empirical aspect, as well as the application one, that through my studies and research I fit into the development of a discipline which is the subject of interest of economists, sociologists, demographers and social policy researchers. The subjects that I have been dealing with include: active ageing, economic situation - poverty of the old age, material deprivation, application of social indicators in the assessment of the situation of the old people, the employment - labour market activity of older people, assessing their competencies,



productivity and motivation for retirement, organising care for the elderly, social activity of the old generation, discrimination/ageism.

Analyses, including ageing and old age, became key for me for diagnosing in what way defined fields of economy and sociology, including age, develop as chief determinants of socio-economic phenomena and behaviours. It was important for me to concentrate my efforts on trying to answer one of my pervading research questions: how should particular policies (such as social security/pension, labour market, care) be planned and implemented to include current and future demographic changes (population ageing)?

Below I will describe in short areas in which I have carried out research and discuss the genesis of scientific work comprising my scientific output which I present for assessment (in this document all publications which I submit for evaluation are especially indicated by bold letters and there are also presented in the attached to the documentation list of publications).

I distinguish two main areas of my research:

I. Active ageing - concept and methodological aspects, including:

- a. Employment
  - b. Participation in Society (care to older adults)
  - c. Independent, healthy and secure living (poverty analysis and material deprivation)
  - d. Capacity and enabling environment for active ageing (quality of life)
- and

II. Using the social indicators in senior policy (including the active ageing index)

### **I. Active ageing and active ageing policy**

When presenting the achievements that constitute my scientific and research output, I will want to show that these in particular fall in line with the development of the "active ageing" concept that gained particular importance in 2012 in the European Commission's *European Year of Active Ageing and Intergenerational Solidarity*. Before 2012 the concept and analyses pertaining to the policy of active ageing were neither important in Polish scientific literature nor in public discussions (**Ruzik, Perek-Białas, Turek, 2013, item 3.1/see Annex<sup>2</sup>**).

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<sup>2</sup> All publications are listed according to indicated numbers in the List attached to this document and it should be

However, the concept had a recognized position in theoretical considerations, which could be found in international studies (Kalache, Kickbush, 1997, WHO, 2002, Walker, 2002, ActivAge Consortium, 2008). Owing to the fact that I was a project coordinator as the Polish partner in the consortium of the EU's 5<sup>th</sup> Framework Programme (ACTIVAGE), I could contribute to the development of the concept itself as well as to commence research on active ageing in Poland. From that period originate studies with my participation as the editor of the publication "Active Ageing. Active Old Age" - „Aktywne starzenie. Aktywna starość" (Perek-Białas et al., 2005) and publication **Perek-Białas, J., Ruzik A., Vidovicova, 2005, item. 1.1/Annex.**

The initial criticism of the concept of "active ageing" resulted from a unilateral attitude to the problem, including only the economic aspect, especially the frequently debated question of productivity, equated to the need of prolonging professional activity. My research - partaking in projects in the said subject as well as publications with my participation - indicated that it is important to take into account such rules for the actions of individuals/societies to be able to "make flexible choices in management [...] of time devoted to learning, work and rest and to ensure care to others" (see. OECD, 2002 and **Perek-Białas, 2004, item 2.2, p. 106**). Such understanding was connected with the concept of *successfully ageing* known in gerontological literature (Rowe and Kahn, 1998). However, active ageing, not only successful ageing, is currently considered to be the priority in thinking about best preparation for the time of old age throughout ones entire life and not years when one is not active (professionally amongst others). The issues of ageing are located in the current of active social policy debate (Rymsza, 2008) - the active role of the state in organising the social sphere and building order based on interpersonal solidarity is postulated (Raćław, 2011, p. 17). Therefore, it is not only a question of analysis focused on the individual dimension of old age (which would be the domain of psychology), but of social interactions within and co-operation of institutions (the domain of sociology) including the economic consequences of these processes (economics).

The theoretical concept of active ageing, which is most frequently present in my research and studies is convergent with the idea which became operationalized in 2013 in the form of the concept's synthetic

index, i.e. the Active Ageing Index (Zaidi et al., 2013). The scope of the concept areas within which falls my research work has been presented in Table 1. As one can see, it is a concept that requires the presence of many domains simultaneously in order to be able to capture the occurring common interaction between them. Thereby, the presented for assessment research achievements fall within all the said domains and create a conceptually cohesive set of research and studies in the said scope that I will discuss in greater detail further on.

Table 1. The domains of the active ageing

a) Employment/Labour market	b) Participation in Society (care to older adults)
c) Independent, healthy and secure living (poverty, material deprivation)	d) Capacity and enabling environment for active ageing

Source: based on Active Ageing Index and Zaidi et al, 2013.

Already the research work - carried out by me before obtaining the title of PhD - in the role of coordinator in the PEN-REF international project - found follow-up in a subsequent project as part of the 5<sup>th</sup> EU Framework Programme (ACTIVAGE), the work of which I coordinated in Poland in the years 2002-2005, at the same time being an active participant of the project. The project was devoted to possibilities and limitations of running a policy of active ageing in selected European countries. The goal was to check to what extent the understanding and acceptance of the term "active ageing" in the social policy is translated into particular actions that do not link the said theory with a purely productive attitude towards ageing (*productive ageing*), i.e. such an attitude that is to be used only on the labour market and one which once was associated and promoted by some economists and social policy researchers as the only correct model. Such understanding has been reflected in the recommendations of the European Commission, in appropriate documents influencing the forming of national labour markets. The effects of this work were reports that constituted an input to the international discussion, referred to by scientists in their publications (indicated the ActiveAge Consortium). For example, prof. Alan Walker from the UK - a renowned authority in this field - in his publications (Walker, 2013) refers to the achievements of the ActiveAge project, not referring to a

particular project publication, but to the final report with an indication of the entire consortium which I was an active member. My input was to prepare the concept of research, develop the final reports and studies with the participation of people cooperating in the project. From the point of view of scientific assessment, the said publications following promotion criteria are irrelevant, therefore I do not name them directly, but it is necessary to state that they constituted the basis for further work and scientific studies. From this period it is worth mentioning the 2005 published book in Polish of which I was the editor, entitled "Active Ageing. Active Old Age" ("Aktywne starzenie. Aktywna starość"), Ed. J. Perek-Białas, AUREUS, Kraków, 2005, out of its seven chapters, I am the co-author of five:

a) Active Ageing. Active Old Age - definition of terms, co-author B. Worek, pages 11-24,

b) Securing oneself for old age as a condition for active old age, co-author B. Worek, pages 25-40,

c) The influence of the labour market and pension system features on the professional activity of Poles, co-author A. Ruzik, pages 77-92,

d) Political and social activity of the elderly, co-author M. Kocór, pages 93-110,

e) Evaluation of the possibility of realising the active ageing policy in Poland, co-authors: A. Jurczak, A. Małodzińska, pages 129-152.

During the term of the project, analyses and research were carried out (chiefly quality, expert interviews) that allowed, for the very first time in Poland, for full preparation and conceptualisation of terminology, which was rarely used in our country in spite of the fact that these strands had already appeared in demographic studies (see publication of the Council of Europe from 1990/2000, output after the Ageing Summit from 2002).

However, the greatest effect of the studies - apart from the reports - was the joint preparation with A. Ruzik and L. Vidovicova of an article on the policy of active ageing in Poland and in the Czech Republic ("Active ageing policies in the Czech Republic and Poland" (**item 1.1./ Annex**) published in a Philadelphia list important journal entitled "International Social Science Journal". The very fact of this publication coming into being was the result of our joint effort as part of the project. The publication not only referred to the existing definition, but also new elements of the concept were added, which were researched thoroughly by myself and the co-operating team. Clear differences in

preparation for demographic changes in Poland and the Czech Republic were indicated in the conclusions from comparing the *active ageing policy* in both countries. The analyses confirmed that in the Czech Republic actions supporting active ageing were undertaken much earlier than in Poland. Although many of them were critically assessed then, yet those which were introduced at that time brought about significant changes in the policy regarding older generations in the Czech Republic. After some years elapsed, the described activities resulted in a high position of the said country in the active ageing index ranking (as a reminder, the Czech Republic was ranked 11<sup>th</sup>, achieving the best result amongst countries of Central and Eastern Europe, whereas Poland was ranked last - 27<sup>th</sup> out of all 27 countries, 1<sup>st</sup> Edition of the Active Ageing Index). It is worth adding that in the said text, despite a negative assessment of the productive attitude to active aging, it was indicated that these concepts would gain importance in the social policy of both countries. After several years it turned out that the European Year of Active Ageing and Solidarity between Generations (EY 2012), as well as strategic documents created in Poland included the concept at which there had been looked at with reservations before that. My participation (33,3%) in this paper was the same as other co-authors and I did theoretical input for active ageing policies, I presented development of active ageing policy in Poland, I presented/summed up results and I gave recommendations.

My scientific development in the subject of activating the potential of the older people (active ageing) could be continued in the years 2007-2012, after taking on the function of the manager of a project entitled Activating Senior Potentials in Ageing Europe (ASPA) as part of 7<sup>th</sup> FP - EU (coordinator: University in Utrecht, the Netherlands). The project comprehensively analysed the possibilities and limitations of activating 50+, 55+ and older people on the labour market. Particular labour market policies, pension systems as well as forms for supporting older employees by appropriate activities and programmes in companies (*age management*) and in non-governmental organizations were assessed. The participation in the project resulted in three important publications in the Philadelphia list periodicals (**see 1.3 and 1.4, 1.5/Annex**). The results of the project were presented not only in the specified publications, but also in publications of other persons taking part in the project. The unique results for Poland contained in the published scientific works were noticed by OECD and included in the updated governmental version of the

Generation Solidarity Programme - actions for increasing the activity of the elderly in Poland (2014).

In the years 2010-2012 I co-managed, together with dr A. Ruzik-Sierdzińska, and with the participation of mgr Konrad Turek and mgr Zuzanna Drożdżak, a project financed by the Norwegian Research Council pt. The Policy Ideas and Practice of Active Ageing: Political, Economical and Cultural Challenges in Europe (project conducted in the Warsaw School of Economics). The project pertained to in-depth analysis of the assessment of changes occurring in Poland in the scope of old age policy, active ageing policy and linked ageing of population - long-term care. This resulted in the publication of "The Making of Ageing Policy" (2013), Publisher Edward Elgar, for which I co-authored two chapters, one jointly with Polish academics (**item 3.1**) and a chapter written together with scientists from Italy (item 3.2). My share in item 3.1. (30%) based on preparation the content of the chapter, analysis of active ageing policy in Poland in years of 1989-2012, indicating the role of European Commission in shaping this policy, the evaluation of this policy, in input in presentation of conclusions of the work. These publications' subjects were: the analysis of developing a policy of active ageing in Poland (item 3.1.) and assessment of the long-term care system in Poland and Italy (item 3.2).

In result, for many years, my experience and knowledge in the scope of active ageing has been used to the benefit of many institutions, e.g.: AGE PLATFROM Europe (from 2008), The Council for Old Age Policy of the Ministry of Labour and Social Policy (I have been deputy-head of the Council from 2013), The Office of Ombudsman (from 2008), The Marshal's Office in Krakow, Krakow Regional Employment Office (from 2007), The Regional Centre for Social Policy (from 2006). I co-operate with the Department for Old Age Policy at the Ministry of Labour and Social Policy, also in the years 2012-2013 I cooperated with the Ministry of Infrastructure and Development, in 2013 I worked in the 50+ Programme Council, taking part in the project of The Centre for Development of Human Resources. As an expert, I participated in the preparation of government documents, i.e. The Principles for Long-term Old Age Policy for the years 2014-2020 and the Programme for Generation 50+ Solidarity. Actions were aimed at increasing activity of people aged 50+ (subject supervisor: active ageing).

### **I. a. Activity during life - workability and productivity**

In the years 2007-2012 I was the manager of the project entitled Activating Senior Potentials in Ageing Europe (ASPA) as part of 7<sup>th</sup> FP - EU (coordinator: University in Utrecht, the Netherlands). The goal of the project was researching the possibilities and limitations to activating people aged 50+, 55+ and older on the labour market as part of the existing systems of social policy, policies run by companies (*age management*), as well as organisations of the labour market.

The participation in this international project resulted in the preparation of a publication with my input (**item 1.3, 1.4 and 1.5**), as well as support for other publications (including Conen et al., 2013, Anxo et al., 2013). Especially two publications with Konrad Turek pertain to questions that are key for economics and sociology in the scope of effective labour market policies for people aged 50+ (**1.3 and 1.5**). In the case of the first publication (1.3), I gave outline of the paper structure, had input in discussion of previous analysis, analysed the results from research (using the structural equation modelling) and commented on them, whilst developing theoretical strands (50%). In the case of the second article item 1.5.), I took part in defining the theoretical concept of the research at the phase of project application, whereas in the article I specified the strands from the analyses and commented on the results (share 30%).

The realisation of the project and research was possible owing to my input in preparing the theoretical concept of the project that I was coordinating in Poland, developing the project and research principles, including the sample choice and tools as well as the analysis plan to carry out both quantitative research (survey on a random sample of enterprises n=1037) as well as quality research (case studies, interviews etc.).

An important input for the development of the discussed discipline seems a conclusion from the analyses stating that the overall workability and efficiency are reduced with age, however this is not a universal and unchangeable trend. Before our research this issue had not been so profoundly analysed in Poland; furthermore, it was not collated in international comparisons. The concept of productivity stems from an economic perspective, but currently seems too narrow to define the potential and value of employees. The concept of *workability* developed in the nineties is used, which was developed by a team of Finnish scientists

headed by Ilmarinen (Ilmarinen, Tuomi, 1992; Ilmarinen 2001, 2009). Workability is the result of a set of individual features of an employee and situational factors pertaining to a place of work. These are amongst others competencies, education, a system of values, employee attitudes and motivation as well as work type and requirements, the management system and other elements of the work environment. In the said studies unique Polish-scale employer opinions on 50+ employees were presented and thereby the importance of stereotypes was shown in the assessment of their work.

The ASPA research of Polish employers from 2009 and its repetition on a panel sample in 2010 showed that older employees are perceived as possessing lower competence, being less efficient, poorly prepared for work, as well as having difficulty in adjusting to new solutions and new technologies (Turek, Perek-Białas, 2013, item 1.5). The employers valued 50+ employees for their social competencies, management, reliability and loyalty (the so called soft skills). Similar results were achieved in e.g. the Netherlands (Van Dalen et al., 2010, van Dalen et al. 2014). More precise analyses (on the basis of regressive models) showed that according to employers the assessment of productivity depends on chiefly on the assessment of individual (soft and hard) skills, partially on the human resources management policy (age management and ousting out) and the type of work (e.g. in the services sector older employees were more highly valued). Age management, including career planning development, internal mobility, training plans and ergonomic solutions were not only friendly to 50+ employees, but also were favourable for higher level of efficiency assessment. In turn, the policy of ousting out older employees to retire was connected with lower productivity assessment.

Regardless of the actual abilities of the employees, the employers' opinions may have influence on the situation at work (Taylor, Walker, 1998; Loretto, White, 2006; Van Dalen et al., 2009). The conclusions from our research clearly indicate that the negative stereotypes concerning skills and productivity of 50+ employees constitute significant barriers for their employability. They can influence decisions and actions of employers in the scope of managerial practices as well as to lead to discriminatory behaviours (so called *ageism*). They also increase the social approval for earlier resigning from professional activity amongst employees.

The research and article presented results indicated poor use of own human resources to educate employees and increase their competence in the



majority of Polish companies. Examples of enterprises that engage their experienced employees in the role of experts and mentors show that such a strategy is not only a possibility of utilising the potential of 50+ employees as part of age management, but also a great saving, supporting the process of knowledge transfer and stability of employment (case studies of Polish companies as part of the ASPA project confirm this).

Owing to the application of the confirmatory factor analysis (**Perek-Białas, Turek, 2012, item 1.3**), it was possible to show that employers frequently expect the employee to withdraw earlier from work. Unfortunately, older employees are still perceived as a "cost" and constitute a burden for those employers who do not invest in them and are unable to use their skills. On the basis of ASPA research it was possible to identify strategies used with regard to older employees that are applied in Polish companies (**Perek-Białas, Turek, 2012, item 1.3**):

- strategy of enhancing employee productivity, which is most desirable. It includes, amongst others, activities connected with career planning, planning appropriate and suitable training for a particular employee, which allows maintaining one's competitiveness with regards to other employees, ergonomic solutions;
- strategy of ousting out older employees, allowing them to follow earlier retirement pensions schemes, partial pension schemes, which results from a cost account basis, getting rid of less productive employees;
- strategy of adjustment and cost reduction within which the companies apply practice connected with changing time organisation and work character change, flexitime work, irregular work etc.

The identification of these strategies allows to join in the international discussion and show whether this is a universal trend or depends on a system of different policies (labour market, social security) with regard to older employees, which - if they are not effective - should be changed. The results of research were used for the preparation of various governmental documents including the Generation Solidarity Programme, actions to the benefit of increasing activity of the elderly (2014), in which I actively took part as the member of the 50+ Programme Council at the Ministry of Labour and Social Policy. Furthermore, the results of research in the evaluation of the labour market for people aged 50+ in Poland became a point of interest for OECD.

Within the same subject area, apart from the publications enumerated above, I have presented the following publications specified in the Attachment:

- prepared by myself: 2.6, 2.7, 2.8, 2.9, 2.10, 2.11, which are directly related for this evaluation

- prepared as a co-author: 4.1, 4.6, 4.8, 4.10 and they are listed in the Attachment

### **I. b. Social activity during old age - Participation in Society**

The social participation of older people is a subsequent important issue raised during my research. Apart from known benefits of being active socially (voluntary work) it was important to identify problems key for organisations/entities taking advantage of work of the old people; the existence of which is still poorly diagnosed and analysed in Poland. It is so due to the fact that the social activity of the old people in Poland is still low (see results of the Active Ageing Index, SHARE<sup>3</sup>). I had dealt with this subject prior to the ASPA project, but only as part of the project I was able to identify not only the benefits but the problems as well (item 3.5 and 1.4).

The identification of problems with activating the older generation was carried out on the basis of the ASPA project (Principi et al, 2012). As part of the project 74 non-governmental organisations were researched in the following countries: Germany, Denmark, Sweden, the Netherlands, Italy, Poland and the United Kingdom of which 27 rendered social services. My task, whilst preparing article 1.4, was chiefly to sum up the research results of the organisations and show the difficulty in capturing voluntary activity of the old people in comparative research (my share 10%). Amongst others, it was possible to identify problems, which are encountered in European organisations dealing with older volunteers, i.e. problems with giving suitable tasks for the old generation as their capabilities change (including physical, health). When organisations are focused on a particular group, e.g. children, they aim to maintain appropriate proportions between older and younger working people. They try to avoid engaging a large number of older volunteers in order not to discourage younger volunteers from work. Problems were diagnosed with convincing older volunteers to introduce necessary changes, to commence additional educational effort and additional

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<sup>3</sup> Survey of Health, Ageing and Retirement

learning. Difficulties appeared in the performance of tasks in sudden situations of change, under time pressure or the realisation of a particular task that could not be done later etc. This thought is elaborated upon in the chapters where I contributed (items 3.4, 3.5) in an international book publication entitled "Active ageing: Voluntary work by older people in Europe" (2014). Especially item 3.5 written with A. Principi is sum up of research carried out in one of package of the ASPA project. I had an input in preparing the part of the introduction, of old age volunteering problems, interpretation of results, and preparing conclusions (my share 40%).

### ***Care to the older adults***

An important issue in the analysis concerning the economic consequences of ageing is the reconciliation of the carer's work and parallel care for an older member of the family (*reconciliation of work and care*). In result of this interest, I independently prepared items **2.12 and 2.13.**

This issue, carrying economic conditioning of linking the labour market with the aspect of social consequences for the functioning of families and carers for the old persons, was the subject of detailed analyses as part of the "Carers@Work" international project, which I coordinated in Poland in the years 2009-2011 (the Volkswagen foundation project about: Reconciliation of professional roles and caring for an elderly person - Care@Work). The project was realised at the Jagiellonian University in co-operation with scientific institutions in Germany (TU Dortmund), Italy (INCRA, Ancona), the United Kingdom (University of Oxford). On the basis of a unique study of working carers of older people and as a main result of the project together with Justyna Stypińska there was published the paper in Antropological Notebooks (**item 1.6**) in 2014. The article shows how carers of the older persons need to cope without measures that could effectively support them as carers in Poland. We present what is possible and what should be changed. The research falls in with international discussions regarding this subject and indicates a need of undertaking particular actions as part of a policy, not only of the labour market, but also of caring for the elderly, as well as other policies, which will answer new challenges connected with ageing population in an effective way (including measures in companies, enterprises). My input in the publication, which is coming into being,

pertains to preparing the theoretical concept for research, already at application phase, and partaking in preparing the study, as well as commenting on the results from an international perspective (my share 40%). I prepared also a publication based on results of the project with J. Stypińska (item 4.7) as part of regular meetings of gerontologists in Łódź.

I presented, in a joint English language publication (with M. Raclaw) (item 3.8.). My share (50%) was based on outlining the structure of the paper, analysis of current situation, considerations concerning the possibility and limitations of organising a system of care for the elderly in the future in Poland, indicating future directions of changes in this care and sum up of conclusions with recommendations. This text refers to the scope and role of long-term care in a system of social security, focuses on possible future scenarios for the development of this sector in Poland, including the economic consequences, taking into account the development of the labour market in the service sector, which falls in line with my earlier work in this area, especially item 2.13.

#### **I. c. Analysis of poverty and material deprivation**

For the purpose of analysing the economic and material standing of older generations I applied - *inter alia* - advanced statistical methods (bootstrapping in estimating the value of indicators in assessing the material situations of older groups). This strand of my works falls within the issues of social statistics, where the analysis of the economic, material situation in connection with the analysis of material deprivation (items 2.3, 2.4, 2.5) and quality of life (item 1.2. 2.16, 2.17) link together. I prepared publications in this field myself, which were presented at the Congress of Polish Statistics in Poznań (2012) and at numerous conferences (including EU-LFS, EU-SILC Users Conference, in Mannheim; ESRA, ESA). I discuss both difficulties and possibilities of applying particular indicators in them, suggesting a wider coverage of issues and their assessment in context of demographic changes (items 2.14, 2,15). Also in the scope of these subjects, I have prepared other publications of which I am a co-author (item 4.1, item 4,3).

#### **I.d. Capacity and enabling environment for active ageing - analysis of equal treatment of older people**

Another issue, which is in the scope of my interests, is the **discrimination of older people** (item 4.4.). I took part in a project entitled "Equal treatment as a standard of good management" (Równe Traktowanie Standardem Dobrego Rządzenia) in the role of manager for subject "Older People" and manager of survey research. In this scope I also support the actions of the Ombudsman - currently Prof. dr hab. Irena Lipowicz - working in the Expert Team for Older People. As well from 2014 I am in the Management Committee of COST Action IS1402: *Ageism - a multi-national, interdisciplinary perspective* (till 2018).

Summing up my output, apart from my own works, I also have joint publications in international publications/monographs, which show not only issues pertaining to the policy of active ageing and its consequences for Poland (**item 3.1.**), but also a comparison of long-term care for older people between Poland and Italy (**item 3.2.**), the on-going discussion on the influence of the socio-economic status on life's fortunes (**item 3.3.**). Additionally, the issues of social activity amongst old people have been looked into more profoundly in publications 3.4. and 3.5.

## **II. The use of social indicators in the analysis of economic and material situation of older people in the countries of Central and Eastern Europe**

By analysing the consequences of population ageing, in my works I have drawn attention to:

- 1) the possibility of using appropriate indicators in the assessment of the current situation pertaining to both current and future generations of the old people (**item 1.2, 2.14, 2.15, 4.3**), as well
- 2) the correctness of their construction and use in undertaking intervention.

In the years 2009-2011 I was a participant of the first edition of projects within a special scholarship programme of the ERSTE foundation from Vienna, Austria entitled Generations in Dialogue. The grant was realised at the Warsaw School of Economics. The goal of the project was carrying out in-depth statistical analyses on the socio-economic consequences of demographic changes in Central-Eastern Europe with the use of EU-SILC data. The participation in this grant allowed me to better recognise to what extent, on the basis of evaluating available existing data and assessing its comparability, adequacy and currency, one can indicate similarities or differences in the quality of life of older

people in selected countries of Central and Eastern Europe. Owing to this project I prepared many presentations and lectures (e.g. at the ESRA, ESA conference, at a conference in Plovdiv, Bulgaria and at a conference in Budapest, Hungary) as well as publications, e.g.: "Some Socio-economic Consequences of Population Ageing in Selected Central and Eastern European Countries", Budapest, 2012 (item 2.5).

As part of the research work carried out in the project "Generations in Dialogue" with the use of statistical data (including EUROSTAT data, EU-SILC research) I analysed the difference between the situation of older people in selected countries of Central Eastern Europe (see 1.2, and 2.1, 2.14, 2.15). Apart from analysing results, I indicated particular actions and recommendations for the system of collecting data used in public statistics, including the differences between women and men in the countries of Central and Eastern Europe. During the course of these studies I showed evidence that there is a necessity of looking at the consequences of ageing in the scope of socio-economic standing of older generations also with regard to differences resulting from gender (item 1.2). The conclusions which I presented in this text with L. Mjelde - Mossey (1.2) not only reflect the situation of older women in selected countries of Central and Eastern Europe, but are also a voice in an international discussion on the need of using appropriate information in the analysis of consequences of population ageing, what is currently used in analysis of active ageing index by gender. In joint publication with L. Mjelde-Mossey (item 1.2) I am the main co-author, who prepared the theoretical concept of the paper, did analysis of data and presented results, with conclusions (my share - 80%).

In the period from 1<sup>st</sup> February until 2015 I am co-ordinating research in Poland of the international European Minimum Income Network project (project EMIN) realised in the Centre for Evaluation and Analysis of Public Policies at the Jagiellonian University. The project focuses on assessing to what extent the households with old persons have the capacity of financing life necessary products and services, allowing for a decent life when retired (methodology used for defining so called referencing budgets). In the realisation of the project, I co-operate with the European Anti-Poverty Network, AGE Platform Europe and other organizations such as the Municipal Social Care Centre in Krakow (Miejski Ośrodek Pomocy Społecznej), The Jagiellonian University of the Third Age, The Academy of Full Life (Akademia Pełni Życia).

In 2013 I prepared a study that was a voice in the methodological discussion on the possibility and limitations of using indicators pertaining to active ageing at regional level (NUTS-2). Upon the order of the Department for Old Age Policy of the Ministry of Labour and Social Policy I took part in preparing two expert studies (Perek-Białas, Mysińska, 2013, Perek-Białas, Zwierzchowski, 2014), which are attempts to construct a composite indicator of active ageing in a regional perspective and so inspiration for others in possibilities of using this approach in other European countries. These studies are based on a European Commission project (Directorate General for Employment, Social Affairs and Inclusion), realised together with the Population Unit of the United Nations Economic Commission for Europe and the research team of the European Centre for Social Welfare Policy and Research in Vienna, currently either University of Southampton, Prof. A. Zaidi et al., 2013). Owing to this work, not only theoretical considerations pertaining to the use of indicators to build synthetic measurements were strengthened, but also the practical implications for policies (including the senior policy) not only at national level, but also regional or even local gained force. Both the original indicator as well as the modified (regional) one are to be tools for measuring unused potential of older people and to assess the possibilities for the development of ideas of active and healthy ageing and even checking in which countries (in the case of Poland - regions/voivodeships) this is best realised. The index is to indicate a level at which old people can run an independent life through independent functioning, activity on the labour market within paid-for work, but also activity within unpaid-for work (social work, voluntary work) - social activity and possibility of realizing policies of active ageing in a given country, region. The composite indicator that showed the position of European countries (in the case of Poland of regions/voivodeships) in the implementation of the policy of active ageing, included different areas of interest comprising the definition of active ageing presented above in Figure 1. Thanks to this, for the very first time in 2013, it was possible to carry out such an analysis within a regional approach in the European context. In result, commencing with January 2014, I have been partaking in the work of an Expert Team appointed at the European Commission and UNECE to work the methodology for the active ageing index in Europe, not only for the countries of Europe, but regions as well.

### III. Economy and gerontology

An important point in my work concerning approaching economic issues was preparing a text entitled "Economic gerontology: Older people as Consumers and Workers" (item 3.6). Initially, I was writing this independently in line with the concept and content layout, which I considered necessary to present the connections between the said fields. However, I came to a conclusion that a chapter in the monograph published by Springer would be more valuable if one could add considerations from the economic, demographic and gerontological perspective. Therefore, I invited the economist professor Joop C. Schippers from Utrecht University, the Netherlands, to join in. My contribution (75%) consisted in preparing a significant part of the chapter (including elaborating on the data and analyses, summing up). Other issues, which are in the area of interest of economists, such as saving, preferences connected with retiring, I analysed as part of scientific work published in reviewed publications (item 3.7, item 4.5). Issues connected with Poles preparing for old age by saving have been shown in publications 3.7, which - in a way - is a return to research prior to my PhD, however in a different dimension and in connection with the subject of retiring. In this joint publication with Prof. M. Rószkiewicz besides of outlining the concept of the paper, introduction, I did analysis of results from survey about motives and limitation of retirement decisions, I had input in conclusions (my share 50%).

Summing up of my scientific research, H index according to Publish and Perish is equal to 5 (including 98 publications, 131 citations, according to Google Scholar either 5 (February 2015). Additionally, below there is a report from the Web of Science<sup>4</sup> (February 2015):

Title	Authors	Source Title	Publication Year	Total Citations
Active ageing policies in the Czech Republic and Poland	Perek-Bialas, Jolanta; Ruzik, Anna; Vidovicova, Lucie	INTERNATIONAL SOCIAL SCIENCE JOURNAL	2006	6
Did the transition to a market economy and EU membership have an impact on active ageing policy in Poland?	Ruzik-Sierdzinska, Anna; Perek-Bialas, Jolanta; Turek, Konrad	MAKING OF AGEING POLICY: THEORY AND PRACTICE IN EUROPE	2013	1
Ageing and long-term care in Poland and Italy: a comparative analysis	Drożdżak, Zuzanna; Melchiorre, Maria Gabriella; Perek-Bialas, Jolanta;	MAKING OF AGEING POLICY: THEORY AND PRACTICE IN EUROPE	2013	1

<sup>4</sup> As in English there is a missing of letter „P”, in database also it is needed to look for the name: Perek-Bialas.



	Principi, Andrea; Lamura, Giovanni			
Organisation-level policy towards older workers in Poland	Perek-Bialas, Jolanta; Turek, Konrad	INTERNATIONAL JOURNAL OF SOCIAL WELFARE	2012	1
Volunteering in older age: an organizational perspective	Principi, Andrea; Lindley, Robert; Perek-Bialas, Jolanta; Turek, Konrad	INTERNATIONAL JOURNAL OF MANPOWER	2012	1
Working carers in Poland - successful strategies for reconciliation of work and care of an older adult	Stypińska, Justyna; Perek-Bialas, Jolanta	ANTHROPOLOGICAL NOTEBOOKS	2014	0
The role of employers opinions about skills and productivity of older workers: example of Poland	Turek, Konrad; Perek-Bialas, Jolanta	EMPLOYEE RELATIONS	2013	0
COSTS AND BENEFITS OF VOLUNTEERING IN OLDER AGE IN EUROPE: ORGANISATIONAL PERSPECTIVES	Principi, A.; Lindley, R.; Perek-Bialas, J.; Lamura, G.	GERONTOLOGIST (abstract)	2012	0
ORGANIZATIONS' VIEWS ON EMPLOYEES WITH CARE RESPONSIBILITIES FOR OLDER FAMILY MEMBERS IN EUROPE	Principi, A.; Di Rosa, M.; Perek-Bialas, J.; Lamura, G.	GERONTOLOGIST (abstract)	2012	0
Ageing in Society: European Perspectives on Gerontology, 3rd Edition	Perek-Bialas, Jolanta	JOURNAL OF WOMEN & AGING (review)	2009	0

Source: Web of Science, February, 2015

#### 4. Presentation of other scientific and research achievements and teaching and organizational<sup>5</sup>

Important scientific achievements besides of that above there are following publications:

3.2	Ageing and long-term care for elderly: comparison Poland and Italy?	'The Making of Aging Policy: Theory and Practice in Europe', editors R. Ervik, T. S. Linden	Zuzanna Drożdżak, Gabriella M. Melchiorre, Jolanta Perek-Białas, Andrea Principi, Giovanni Lamura	Edward Elgar Publishing, 2013, pp. 205-230
3.3	Socio-economic status in ageing Poland: A question of cumulative advantages and disadvantages	(w:) K. Komp & S. Johansson (Eds) <i>Lifecourse perspective on ageing populations: A critical and international approach,</i>	Konrad Turek, Jolanta Perek-Białas, Stypińska Justyna	Bristol, The Policy Press 2015
3.4	Older volunteers in	<i>Active ageing: Voluntary work by older people in</i>	Konrad Turek, Jolanta Perek-Białas	The Policy Press, University of

<sup>5</sup> The detailed list of scientific-research achievements according to requirements of the law act there is in the attachment to this document.

	Poland: the heritage of the socialist regime	Europe, Editors: Andrea Principi, Per H. Jensen and Giovanni Lamura,		Bristol 2014, pp. 173-196.
3.9.	The elderly care regime and migration regimes after the EU accession: the case of Poland	Ageing in the context migration, ed. U. Karl and S. Torres	Jolanta Perek-Białas, Krystyna Slany	(przyjęta do druku), 2015
3.10	Informal and formal reconciliation strategies of older peoples' working carers: the European carers@work project	Vulnerable Groups & Inclusion,	Hoff A., Reichter M., Hamblin K., Perek-Białas J., Principi A.	2014, <a href="http://dx.doi.org/10.3402/vgi.v5.24264">http://dx.doi.org/10.3402/vgi.v5.24264</a>

I have also 10 joint publications in monographs, and in Polish publishers, which are linked to the topic of my achievements (details in Attachment). Besides of that I was an editor of publications:

1. *The Ageing Societies of Central and Eastern Europe: Some Problems-Some Solutions*, ed. A. Hoff, J. Perek-Białas, Jagiellonian University Press, Cracow, 2008, pp. 185.
2. *Developing the 'Sociology of ageing' to tackle the challenge of ageing societies in Central and Eastern Europe'*, ed. J. Perek-Białas, A. Hoff, Jagiellonian University Press, Cracow, 2012.

### **The Methodology and application of multi-dimensional methods in socio-economic analysis**

As part of this research area I developed a number of texts, which were presented on specially organized with my participation - Methodological Workshops of S. Mynarski (Warsztaty Metodologiczne im. S. Mynarskiego). Below list of publications in Polish:

1. „Identyfikacja zależności motywacyjnych w postępowaniu konsumentów” [Identification of motive correlations in consumer behaviour], in: „Zależności przyczynowo-skutkowe w badaniach rynkowych i marketingowych” [Casual relations in market and marketing research], Ed. S. Mynarskiego, AE Kraków, 2002, pp.199-206.
2. „Możliwości systematycznej analizy danych jakościowych uzyskanych z wywiadów grupowych” [Possibilities of systematic analysis of qualitative data analysis from the Focus Group Interviews] (co-author: B.

Worek), in: „Analiza i prognozowanie zjawisk rynkowych o charakterze niemetrycznym” [Analysis and forecasting of market outcome of non-metric character], Ed. E. Gatnara, AE Katowice, 2003, pp. 87-105.

3. „Analiza danych z prób złożonych w badaniach socjologicznych: bariery i wyzwania” [Analysis of data from complex samples in social research: barriers and challenges] (co-author J. Górniak), in: „Metoda reprezentacyjna w badaniach społeczno-ekonomicznych” [Survey sampling in socio-economic research], Ed. J. Wywiał, AE Katowice, 2003, pp. 133-141.

4. „Współpraca firm badawczych z ośrodkami naukowymi – ocena wykorzystania metod ilościowych w praktyce badawczej” [Cooperation of research agencies with academic centers – evaluation of use of quantitative methods in research practice], in Prace Naukowe, AE WROCŁAW nr 1107, Ed. K. Mazurek-Łopacińska, 2006, pp. 486-495.

5. „Tworzenie map pojęciowych. Jakościowa technika rekonstrukcji procesów kognitywnych” [Constructions of concept mapping. The qualitative technique of reconstruction of cognitive process], co-author B. Worek, Ed. J. Garczarczyk, AE nr 71, Poznań, 2006, pp. 165- 178.

6. „Wykorzystanie metod ilościowych w badaniach marketingowych w Polsce” [The application of quantitative methods in market research in Poland], co-author U. Korzeniecka, ASK. Metody. Badania. Społeczeństwo, nr 15, IFIS PAN, Warszawa, 2006, pp. 51-74.

7. „Interakcje w modelu regresji logistycznej” [Interactions in logistic regressions], in: „Badanie konkurencyjności i konkurencji przedsiębiorstw i produktów na rynku”, Ed. S. Mynarski, Wydawnictwo Uniwersytetu Ekonomicznego, Kraków 2007, pp. 50-56.

8. „Raportowanie wyników badań – nauczanie a praktyka” [Reporting the research results – education and practice], [in]: „Wizualizacja wyników badań marketingowych” – podejścia, metody i zastosowanie, Ed. M. Walesiak, Prace Naukowe UE We Wrocławiu, 2009, Nr. 86, pp. 75-84.

9. Sagan, A., Perek-Białas, J. (2011), „Analiza interakcji konsumenckich – podejście strukturalno-sieciowe” [The analysis of consumer interactions – structural – network approach], Zeszyty Naukowe/Uniwersytet Ekonomiczny, Poznań, (201), 7-19.

The publication which is of great importance to me due to the character of collected information – both theoretical and practical in the scope of methodology – is a book entitled: „Projektowanie badań społeczno-ekonomicznych: rekomendacje i praktyka badawcza” [The Socio-Economic Survey Design: recommendations and research practice], (2013),

M. Rószkiewicz, J. Perek-Białas, D. Węziak-Białowolska, A. Zięba-Pietrzak, Publisher PWN, Warsaw.

The detailed list of my remaining scientific-research achievements (including scientific projects, participation and organization of conferences, information about scientific visits and awards) is included in the Attachment.

### **Teaching achievements**

At present (September 2014) I am employed at the position of assistant professor<sup>6</sup> (full time) at the Warsaw School of Economics and part time at the Jagiellonian University. Having started running teaching classes, each year I have more of them than the curriculum required workload, e.g. in the academic year 2012/2013 - 276 (carried out)/210 (required) hours of teaching.

During the last term at the Warsaw School of Economics I ran the following courses: Analysis of household consumption patterns, Survey research designing and methods of statistical analysis, MA seminar. In the past I also ran classes in statistics, Marketing research workshops, Quality marketing research, BA seminars.

For several years I have been conducting classes at BA studies at a degree course of Quantitative methods in economics and information technology (MIESI).

Apart from that, in the previous years I held classes at the JU Institute of Sociology in Multi-dimensional data analysis to the lectures of prof. dr. hab. Jarosław Górniak, and for several years I have been running classes independently for which I prepared my very own courses *Survey Sampling in social research*, *Secondary data analysis*. In the academic year 2012/2013 I had my own course - a subject pro-seminar, which gave me the possibility of working with students interested in research in the area of sociology of ageing and old age.

I have been also regularly co-operating with prof. dr. hab. Adam Sagan for a few years within his lecture programme of *International market analysis*, running classes for the students of the Cracow University of

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<sup>6</sup> Adjunkt [in Polish]

Economics (10 hours until 2014/15 hours from February 2014). Several years earlier I conducted classes in evaluation at the same University as part of post-graduate studies in social economy. Furthermore, in the past I also delivered classes at the Tischner European University in methodology and statistical analysis.

The greatest teaching achievement for me is the annual organization from 2004 of regular workshops pertaining to data analysis for the best students of sociology, active in the section of social research methodology as well as students of major Quantitative methods in economy and information systems at the Warsaw School of Economics, and for two years, for the students of the SWPS University of Social Sciences and Humanities in Warsaw. This is an initiative that I run on a voluntary basis and treat as a social mission of teaching students new techniques and methods that may be useful in their professional work. Students with a passion come to the meetings, whereas the academics apart from me comprises lecturers from other universities such as prof. dr hab. Adam Sagan, prof. dr hab. Jarosław Górniak, dr Sylwia Bedyńska. In the most recent years the lecturers were: dr Magdalena Jelonek, dr Dorota Węziak-Białowolska, dr Maja Rynko, dr Seweryn Krupnik, dr Karolina Keler, mgr Agnieszka Pleśniak, mgr Iwona Pilchowska and others.

Furthermore, I have been running regular classes as part of data analysis workshops of the Ariadna programme of the company Predictive Solutions (formerly SPSS Poland) for scientific personnel and PhD students of Polish universities (including sample selection, modelling structural equations).

In the years 2003-2012 I performed the role of a supervisor of the Student Scientific Circle of Market Research at the Warsaw School of Economics (SKN BM SGH). Together with the students I also realised projects and research with companies like 3M, Whirlpool, Philips (November-December 2010). SKN BM SGH carried out research for Magiel Warsaw School of Economics Independent Student Monthly Magazine, for the Warsaw School of Economics Student Self-Government on trademark recognition of Viaguara (April-May 2011), the Siskom association (November 2010 - January 2011). The students organized SPSS Workshops for the Warsaw School of Economics students (May 2010, 2011), Data analysis workshops in Żarki (May 2010, March 2011), Research on the Warsaw School

of Economics student hostel attractiveness (May - June 2010), supported in analysing research carried out by the NZS Independent Student Association (June 2010).

In the years 2004-2007 I was the supervisor of the Methodology Section of the Scientific Circle of Sociology Students and the Jagiellonian University. At present I am once again the supervisor of a group of students of sociology at IS JU. Student research projects (e.g. safety in student hostels) are consulted with me as the group supervisor as well as the organisation of meetings with research companies (PMR).

Commencing with 2002 I have been supervising MA theses as well as BA theses at the Warsaw School of Economics. By January 2015 I was the advisor of more than 110 MA and BA theses<sup>7</sup>. At that time my students applied for training and scholarships, making great progress and winning competitions (e.g. mgr Joanna Wójcik, who prepared a thesis entitled *Propensity to give answers and the lack of data on the basis of the European Social Survey* was a winner in the STATA competition in 2012, presentation during the ESRA Conference, with mgr Magdalena Burdach in September 2014 we presented the paper on *possibility to apply structural equation modelling in comparison of attitudes in Poland and Germany based on European Social Survey* in Jabłonna, Organizer: Institute of Philosophy and Sociology Polish Academy of Science). As part of the *European School of Demography* (in the academic year 2013/2014 at ISID Warsaw School of Economics) I was the advisor of Tim Winkle, who has been preparing a PHD linked with the subject of my scientific interests.

During time when I was working on full-time in the Institute of Sociology I was supervisor of master thesis (in total 6), from the topics which are related to my scientific interest, as: J. Florek (defence 22.06.2005) - "Wizerunek osób starszych w prasie na przykładzie tygodników *Polityka i Wprost*" [The image of old age in newspapers based on weekly journals like *Polityka* and *Wprost*], L. Marszałek (defence 03.06.2005) - "Opieka nad osobami starszymi; pomoc społeczna czy rodzina? - na przykładzie powiatu bocheńskiego" [The elderly care: social assistance or family? - based on bocheński powiat], M. Gnidzińska (defence 19.11.2005) - "Wpływ bezrobocia

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<sup>7</sup> In the database of the Warsaw School of Economics library (catalogue of ALEPH) [www.sgh.waw.pl](http://www.sgh.waw.pl) there could be obtained update list of thesis of which I was supervisor (name, family name, title and year of defence).

na tradycyjne ujęcie roli kobiety na Górnym Śląsku" [The impact of unemployment for traditional role of women in Upper Silesia].

So far, I have not been a scientific advisor of PhD students, but as part of international projects run and managed by myself I co-operated with MA graduates - colleagues who in their majority already possess the scientific title of PhD in economics (dr Anna Ruzik-Sierdzińska, dr Agnieszka Chłoń-Domińczak), in social science (dr Marcin Kocór, dr Barbara Worek, dr Szymon Czarnik, dr Marcjanna Nózka, dr Justyna Stypińska, dr Karolina Keler). I have been collaborated also with persons who are just before PhD (mgr Anna Małodzińska-Strzebońska, mgr Konrad Turek).

### **Organizational and dissemination achievements**

Within 13 years from obtaining the PhD title, I have been actively engaged in work organised by the Warsaw School of Economics, as well as the Jagiellonian University (e.g. I worked in the Recruitment Committee as the representative of the Philosophical Department) for candidates for MISH studies (Inter-Department Interdisciplinary Humanistic Studies). I took part in exam committees of BA and MA studies (JU) and supported organizations (e.g. organization of databases for research, seminars) both the Institute of Statistics and Demography at WSE as well as the Institute of Sociology of JU.

A very important phase in my scientific development was meeting the Nobel prize winner prof. Thomas C. Schelling (before he received the Nobel Prized in 2005) and organizing - owing to my significant effort - an exceptional lecture at the Jagiellonian University in June 2004. I ran the said meeting - following which - its content was published in a specially dedicated series of the Rector's Lecture of the Jagiellonian University publication.

In the years 2005-2007 together with the National Contact Point of the Polish Academy of Sciences (IPPT PAN) I was engaged in a project within the EU's 6<sup>th</sup> Framework Programme, which was called Triple-Dose (*Days of Socio-Economic: Education, Employment, Europe*). The project was realized with the Institute of Key Problems of the Polish Academy of Sciences (with Wiesław Studencki) - at the JU it had the goal of showing the usefulness and possibility of using research results in creating

appropriate public policies in different areas linked with economy and education in Europe. It was a project for the dissemination of results of selected projects realised as part of 5<sup>th</sup> and 6<sup>th</sup> EU Framework Programmes ([www.triple-dose.pl](http://www.triple-dose.pl)). I therefore took on promoting activities of not only my research results, but also the project realised as part of Framework Programmes. It was one of a number of projects, which in that edition gained financing. It became an important platform to exchange experience as well as an opportunity to learn how particular fields of public policies function in Europe (education, labour market).

I would like to add that together with Prof. Andreas Hoff I was the initiator and co-organiser of sessions in the scope of *sociology of ageing* as part of the three congresses of the Polish Sociological Society in English (Zielona Góra, 2007, Krakow, 2010, Szczecin, 2013) and co-editor of a publication issued by the JU Publisher in the said language and pertaining to the subject of ageing and old age sociology. At present, I am one of the two guest editors of the special issue of *Sociological Studies (Studia Socjologiczne)* devoted to the sociology of ageing, which is to be published in 2015.

My activities pertaining to the organizational side are in particular translated into managing research projects (in line with the specification in the attachment) owing to which it was possible to employ pre-PhD people within employment contracts and thereby give an opportunity for unique scientific development. I can also indicate varied activities of organisational character, e.g. as part of the work of the Krakow Branch of the Polish Sociology Association (I was head of the Branch for 2 years) and from September 2014 I have been the Deputy-Head of the Krakow Branch of the Polish Gerontological Society as well as implemented popularisation skills. Owing to numerous invitations to take part and organize scientific sessions, symposiums, as well as scientific conferences (as part of PTG, PTS), subject conferences (with government and regional institutions like MPiPS, MIiR, OECD) and others (for non-governmental organisations like Age Platform Europe, FORUM 50+) I could actively promote Polish research. Furthermore, I am an expert in many projects, which assume practical implementation of the concept of active ageing in Poland (list of expertise carried out attached).



I use the presentation of solutions in the scope of a policy taking into account the ageing of population, including the practical aspect of their implementation as part of activities in numerous expert groups: Age Platform Europe, Vice-Deputy of Council for Senior Policy at the Ministry of Labour and Social Policy, member of Regional Council for Senior Policy, member of Team for Silver Economy at the Marshal's Office in Małopolska and most recently in the group of scientists and experts working at the European Commission and UNECE as part of Working Group on Active Ageing Index.

I also would like to add that I am a member of the Editorial Board of the known journal titled *European Journal of Ageing* and reviewer/contributor in such journals like: *Gerontologia Polska*, *Studia Demograficzne*, *European Journal of Ageing*, *European Societies*, *Ekonomia Społeczna*, *Studia Humanistyczne AGH*, *International Journal of Social Science*, *Doradztwo Podatkowe*, *Bio-Algorithms and Med-Systems*, *Social Indicators Review*, *Zarządzanie Publiczne*. I did review of research proposals like Foundation for Polish Science, National Science Centre, Poland. I participated in jury and expert teams of various competitions (like from 2014 - Evaluation Board of the Active Ageing Index Seminar organized by UNECE and EC).



