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**INTRODUCTION.  
TRANSITION INTO RETIREMENT  
IN CENTRAL AND EASTERN EUROPE**

The radical political reassessment of the period of communism in Central and Eastern Europe and the fall of many pillars of the socialist economy along with the accelerated social changes, in practice the rejection of many aspects of the traditional culture, the bloom of a youth culture of consumption, the changes in functioning of many families, and increased feelings of threat to personal security, were all reasons for a serious imbalance of the collective memory and identity of the elderly in the Central and Eastern Europe. Their former work was considered next to worthless in the eye of the general public, and their lifetime achievements were questioned. The new world became strange and menacing to the older generation. Discrimination against older people at work, associated with the cult of youth, brought about serious consequences: a withdrawal from professional life made possible by the earlier established legal right to retirement.

For us, the most interesting socio-cultural aspect is entry into retirement. Attaining the so-called “third age” is socially and culturally constructed and is carried out in different societies at different times, and often has little to do with the biological period of aging. However, retirement means a major change in one’s type of activity, often associated with a reduction in income and a new type of social interaction.

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Harald Künemund and Franz Kolland (2007) point out that retirement is a relatively new social phenomenon. Not until the second half of the twentieth century did receiving of income after withdrawal from the labour market become widely practiced those countries in which systems of social security operated. Previously (and currently in countries which lack such a system) the elderly were dependent solely on help from their families and the local community. Martin Kohli associates this emergence of the “new” stage in the individual’s life with a wider process of institutionalization of a life course (Kohli 2007). In fact, the aging process has been structured in the twentieth century with a new, individualized system of work, based on financial compensation. As a result, a human life can be divided into three stages which correspond to the needs of the labour market in industrialized societies: preparation for work, professional activity (employment), and retirement. Today, this type of periodization becomes difficult to maintain in the face of the universality of the processes related to the individualization and de-standardisation of a life course. However, the conditions that must be met in order to efficiently operate a pension system have not changed, one of which is certainly an effective economic system that is able to generate a surplus. There is a need for institutions to be responsible for the redistribution of the surplus among retirees. A society must also accept the fact that a certain period of human life is not associated with the individual’s activity in the labour market. The last condition is a result of a long life, which requires a system of pension arrangements (Hill 2007).

In times of economic slowdown and demographic changes, like those experienced by the countries of Central and Eastern Europe, problems arise with pension schemes. The lack of surplus associated with increased life expectancy needs to draw on the benefits of pension systems, but there are problems with inefficiency. It is a subject of heated debate, particularly in those countries with decreasing birth rates, a phenomenon which undermines the stability of their pension systems. For some European politicians the solution is seen in the gradual raising of the retirement age, which in turn arouses mixed reactions not only among the public and politicians, but also among researchers into aging.

Early retirement has been adopted as a strategy to cope with the economic crisis and the problem of youth unemployment in many European countries (Kohli et al. 1991). Such a functional understanding of pensions means that retirement is a mechanism for regulating the inflow and outflow of a labour force, thereby reducing youth unemployment and replacing the “old” (expensive and less efficient) workers with younger ones (Victor 1994). Meanwhile, long-term research, funded by the National Institute on Aging, on the interdependence between youth unemployment and early retirement shows that there is no correlation between these two phenomena. There are also studies which indicate the opposite correlation: an increase in employment of older people affects a decrease in youth unemployment rates. On the basis of the panel research covering historical data (dating back to the 1970s in Germany), Jonathan Gruber, Kevin Milligan and David A. Wise show that a 7% reduction in employment of older workers between 1972–1976 involved a 2% reduction not increase in youth unemployment, and a minimal (1.7%) increase, not decrease, of the employment rate among young people. More recent data from the same research show that a 15% increase in the employment rate (between 1998 and the date of the publication of data, 2010) of older workers in the German labour market was associated with the absence of any changes within the unemployment rate

among young people and with a slight increase, rather than a decrease, in the employment rate for this category of age (Gruber, Milligan and Wise 2009).

The logic and social utility of early retirement came under challenge in the mid-1990s. Since then, active aging has appeared in the public discourse. The World Health Organization (WHO) defines active aging as a process of providing individuals with opportunities to lead healthy lives, based on social security and social participation, with the aim of improving the quality of life of older people (WHO 2002: 12). Based on the paradigm of active aging, social policies in many Western countries replaced the strategy of early exit with one of expanding the professional activity of older people. It is not only a question of raising the statutory retirement age. The important aspect of programs aimed at reducing early exit from the labour market and prolonging employment is to improve the skills of older workers and their ability to adapt to the changing technological circumstances. The central issue of programs limiting early exit and promoting extended economic activity is a flexible exit from the labour market, mainly by the transition from full-time to part-time job. The advantage of this for the employer is in retaining qualified personnel and benefiting from their knowledge and experience. The employee, in turn, can use the additional free time to deal with non-professional activity. Finally, the state benefits from extended participation by saving on pension expenditures (Taylor 2010). The upward trend since 2000 in the employment of people approaching their retirement age does not change the fact that a majority of Europeans continue to retire before reaching the “standard” (statutory) retirement age. Over 60% of men in the European Union (in Poland almost 70%) aged 60–64 years are not active in the labour market. Sara Rix writes, “in many European countries, almost no one works to age 66” (2009: 447). The exceptions are the Scandinavian countries. In Iceland, for example, in the age category 65–69 years the male employment rate is 56%, and the female rate is 41% (OECD Employment Outlook 2013). So why do some countries have a larger number of working elderly people (approaching retirement) than others? What factors influence the eventual deactivation of older workers?

The studies on the deactivation of older workers generally concentrate on employee behaviour just before reaching their retirement age and are based on the push-pull model, disengagement theory, and the theory of productive aging. Another group of studies is based on the findings of the life course perspective and the theories of continuity and commitment. It is worth noting that these theories usually complement each other, and explain in different areas the interesting issues discussed in this publication.

The disengagement theory was one of the first theories to explain, within the frames of functionalism, the process of retiring. The research conducted from this approach focused on the “natural” change of the activity of the elderly with their going into retirement. Importantly, it was emphasized that withdrawal from the labour market increases overall life satisfaction for the elderly. The critics of the disengagement theory have effectively proved that the very same strong correlation between the rate of withdrawal from the labour market and the overall satisfaction with the quality of life does not mean anything. Many researchers, basing their work on the dilemma of cause and effect, have undermined the results of research conducted with the disengagement theory approach, indicating that a high satisfaction with life (often defined by respondents as satisfaction with their financial situation) results in prompt professional deactivation (Künemund and Kolland 2007).

Contemporary studies related to individuals and entire communities going into retirement focus primarily on economic causes and consequences, for individuals and businesses as well as for social security systems, of the exit of individuals from the labour market. The prospect of productive aging (Bass and Caro 2001) is associated with a broader theoretical model in which factors pushing the elderly from the labour market (usually negative) and factors pulling them into retirement (usually positive) are analysed. Distinct attention within the frames of this research is paid to the studies on discrimination and stereotypes associated with older workers (Angus and Reeve 2006; Posthuma and Champion 2009). These behaviours are analysed within the framework of the model referenced in terms of disrupting factors of “successful aging” (Franklin and Tate 2009; Robson et al. 2006). Substantially, all of these studies focus on the push factors. From the point of view of the employing institutions early retirement is an effective way of reducing employment or allowing them to take on younger workers. In comparison to younger employees, employment costs of older workers are higher due to allowances for the working years, older workers are more likely to get sick than younger ones, and it is more difficult to dismiss them (Walker 2000). The public policy instrument in the form of an earlier (or bridge) retirement seems to be in this case an “effective” tool for discrimination against older people in the labour market. In addition, early retirement (still being considered as an instrument of public policy) may prove to be a factor defining older people in a given society.

The productive aging model is based on the assumption that the knowledge and skills of older workers are not sufficiently exploited in the labour market, and their deactivation is very often not a result not rational economic calculation, but rather of cultural expectations formulated regarding the elderly.

Thus the question is: which factors push the elderly from the labour market, and which ones pull them to professional inactivity during retirement? Chris Phillipson and Alison Smith (2005), analysing the results of research on retirement (and possible re-entries to the labour market) conducted in 1999–2005, noted that poor health, disability, tensions and conflicts in the workplace are the most common push factors. Pull factors encouraging the elderly to retire are not necessarily associated with negative effects (e.g. risk of poverty). Therefore, the main pull factors are financial in nature (savings, investments, additional insurance) to ensure their current standard of living (Phillipson and Smith 2005). Other pull factors include a desire to change one’s lifestyle and the opportunity to rest and travel without applying for leave. However, it should be noted that the availability of financial resources determines the possibility of implementing these plans.

Transition into retirement in the perspective of a life course is a process, not a single event. Employees at the age of retirement plan their different scenarios of “a life during retirement” for a long time before making the decision (Ekerdt 1998). Karl Pillemer refers to the life course perspective of linked lives across time and generations. According to him, individuals play different social roles in particular moments of their lives, which are closely linked to the role-playing by the other actors of a family network, but based on past experiences and constructing their own visions of the implementation of social expectations and their own interests. At the same time, implementation of “typical” roles assigned to life of one generation is associated with the lives of other generations within particular socio-cultural systems (Pillemer et al. 2001). For example, the adoption of a caring role by the

grandparents is mainly explained by the economic activity of their children, but the lack of public care institutions is also an important factor.

One important contribution to the perspective of the course of life in the area of retirement is the continuity theory (Atchley 1989). According to this concept, individuals are trying to maintain a lifestyle, attitudes, and vision of themselves for as long as possible into their retirement. In this approach retirement does not necessarily imply a passive attitude towards social reality. Pensioners are still active, but in other areas of life; for example they become involved in non-governmental organizations, act on behalf of the local community, or care for their grandchildren.

Donald Hirsch (2009) identifies the three most common interpretations of (early) employment deactivation of the elderly. Firstly, going into (early) retirement is seen as a positive life choice associated with the belief that after a long period of work it is high time to focus on “myself”. Secondly, according to Hirsch, older workers are encouraged to retire by a pension system operating in a given country, which guarantees financial security after withdrawal from economic activity. Thirdly, older people are discouraged from continuing work, regardless of their competence, motivation and awareness of the economic consequences of early retirement. Hirsch shows that during the last decade there has been a shift of emphasis from the first interpretation to the third one. In other words, more research shows that people would work longer if their jobs were better adapted to the concerns of older workers. There are also studies showing that older workers express their interest in their further professional activity but only under certain conditions, such as the reduction of working hours or greater flexibility of working hours and a place of work that allows them, for example, to improve their health or to reconcile work and family commitments (Taylor 2010). On the other hand, David Ekerdt (2009) argues that the decision about retirement and the form of retirement practices are affected by three characteristics of a social structure: a labour market, a welfare state and the symbolic course of life. These characteristics will be described below.

The demand of the labour market affects one’s decision about the timing of retirement. According to Ekerdt, early retirement most often takes place with certain kinds of jobs: those demanding physical effort and repetition of performed activities; in professions in which technological changes are very rapid, requiring upgrades in vocational qualifications; and in industries in which age discrimination is at play. Early retirement is also observed in times of economic crises. Longer employment activity is typical in occupations related to services and consultancy, in which the process of accumulation of knowledge and experience is positively evaluated; and in those industries in which the remuneration system rewards mentoring. Ekerdt also notes that in these economies with a high proportion of self-employed professionals and people representing the so-called freelancer professions, the average age of retirement is higher than in economies based mainly on the work of an unskilled labour force.

The impact of the welfare state on retirement patterns is primarily based on pension systems that encourage or discourage older workers to retire. Here appear such instruments as a bridging pension or retirement benefits. Public policy instruments, such as protection periods against the release of older workers and training courses, extend the period of professional activity. A state also regulates to what extent an individual can secure financial security in old age with, for example, tax-deductible contributions to individual retirement accounts.

The third structural context of going into retirement, according to Ekerdt, is the symbolic life course. In every society there is a shared culturally defined idea of what a perfect life should look like. In the concept of the institutionalization of the life course (Kohli 2007) it is emphasized that in the different stages of human life different institutions managing the reproduction of a social order are important, but in the concept of the symbolic life course the emphasis is put on collective and informal standards defining the appropriate time to start employment activity, to start a family and to go into retirement. Bert de Vroom (Maltby 2004) uses in this context the notion “age-culture”, which essentially has the same meaning as the term “culture of old age”, applied by Krzyżowski, Kowalik, Suwada and Pawlina (2014), but while for de Vroom the concept of “age-culture” is used only in relation to the labour market, for us it has a wider application (e.g. it also applies to intergenerational family relationships, regulating whether parents can expect help from grandparents in caring for their grandchildren). The age-culture is defined by de Vroom as a set of norms, values and ideas which structure the idea of an age-work relationship. De Vroom distinguishes two perfect age-cultures: the late-exit culture, which in the best way describes strategies for retirement in Norway, and the early-exit culture, which is common, for example, in France.

Ekerdt notices that structures (of a labour market, a state and a society) determining the shape of retirement strategies, do not exist without acting individuals, whose individual capabilities (and limitations) affect the time and form of going into retirement (2009). Health problems can greatly affect one’s willingness to continue a gainful activity. A state provides, to various degrees, financial security in the form of retirement benefits, but an individual assessment of one’s own savings can have a greater influence on the retirement decision than public policy tools. Experience of the employee may be desirable in the workplace, which does not mean that dissatisfaction with the performance of this work, combined with a calculation of own savings, is not going to affect a decision on earlier going into retirement. Finally, the family situation is also important. Retirement decisions depend not only on the professional situation of other family members (primarily including the employment situation of a spouse/partner), but also on intergenerational obligations. On the one hand, having a dependant requiring constant care such as a disabled child, may instead extend ones professional activity. On the other hand, the need to care for their grandchildren and/or old parents favours an early labour exit (Ekerdt 2009).

Therefore, going into retirement is – in the context of the abovementioned analysis – a phenomenon which is difficult to define. It does not necessarily mean the immediate giving up of work activity after a certain age. It can also be a process of going into retirement after a period of long-term unemployment. Along with the collection of retirement benefits it is also possible to simultaneously take other forms of flexible employment. Going into retirement may eventually involve a specific event in the life of an employee, such as a special retirement party in the workplace, or receiving a first pension benefit. But what about a discussion on retired people who had not worked just before their retirement? All these factors require the necessity to adopt an interpretation framework for analysis of going into retirement. Firstly, retirement is certainly a right to receive a pension. This does not necessarily mean a total exit from labour activity, although the majority of workers in OECD countries go into retirement before their statutory retirement age and completely give up work (OECD 2011). Thus, early

retirement is not only a European tendency. Does it mean that retirement should be defined in terms of the transition from “activity” (defined through the prism of economic activity) to “passivity”? In other words, does professional deactivation mean inefficiency of the elderly? The answers to these questions depend on how the term “productivity” is defined.

Productive aging, as a term to describe the activity (or lack thereof) of the elderly, was actually originally related only to economic values. Market definitions of productivity focused their attention on the presence of older people in the labour market. From the sociological perspective, complements to this kind of productivity include volunteer work, child care, personal care (e.g. for elderly parents, spouse), help in maintaining hygiene, and other forms of informal help, as long as they are relevant to the others. The psychological approach to productivity emphasizes the importance of taking care of the quality of life, undertaking physical activities, and maintaining social contacts (Künemund and Kolland 2007). For us, to analyse the productivity of older people, the most valuable are the sociological methods. Künemund (2000) shows that in Germany 39% of people aged 70–85 performed productive activities in the sense that the results of these activities could be associated with economic value: child-care, care for a spouse and other dependents, activities in non-governmental organizations, and informal assistance within the family and local community. Going into retirement rarely means giving up activity. On the contrary, time previously devoted to paid work is often used in a productive way after retirement. Changes associated with an activity are, of course, dependent on the individual’s capabilities. One’s health condition does not always allow for engaging in activities for a local community. On the other hand, the practice of taking care of grandchildren fades with age – not only due to deteriorating health, but also because of the simple fact that sometimes grandchildren do not require care. Even at the most advanced stages of life we can talk about the “productivity” of elderly, if we consider it by the financial remittances sent to younger generations, which is the standard in the majority of European societies.

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This issue of “Contributions to Humanities” presents various aspects of transitions to retirement in Europe, particularly in post-communist countries. The process of retirement is analysed from various points of view; to name a few: the political perspective and the challenges faced by current public pension systems in ageing societies, the macro perspective which analyses the structural reasons for (early) retirement, and the micro perspective of individuals and their ways of experiencing and dealing with exit from the labour market. Therefore, for this issue we sought out an array of papers that extensively discuss the problem of retirement, and inevitably the problem of aging, in Eastern and Central Europe. Obviously, this publication examines only a fraction of this broad problem and is by no means exhaustive, thus we hope that it will serve to stimulate the further discussion.

The articles presented here may be divided into two types – those focusing explicitly on the issue of retirement and the problem of public pension systems, and those that deal with the broader problem of ageing.

In the opening article *Later retirement? Structures, preferences, policies* Martin Kohli discusses the problem of later retirement from the perspective of the public policy system.

In the face of demographic changes, most European welfare states have to deal with the unsustainability of pension systems in the face of high expenditures. Such a situation requires reform and one basic potential solution is to raise the age of exit from the labour market. The author claims that this could be a problematic yet effective idea, taking into consideration the preferences of European citizens and strategies adopted by European governments.

The following article by Jolanta Perek-Białas is of a methodological nature. It starts with the presentation of the interplay between active ageing and material deprivation of older generations. The author presents how material deprivation is applied in active ageing policy via the Active Ageing Index. It suggests that the available data allows for cross-country comparisons, yet there is still a lack of indicators that would be useful and valid in making comparisons at the regional level. The second part is devoted to the case of Poland and should be seen as suggestion regarding how to adopt the concept of Active Ageing Index for Polish regional comparisons based on the available national data.

The third article *Preference theory in higher age and the Czech older workforce*, by Lucie Vidovičová, aims to answer the question why some older workers decide to continue to work while others wish to retire as early as possible. The analysis is based on survey data from the Czech Republic, a country with a low average retirement age and unfavourable institutional conditions for continuing employment. The author distinguishes three types of older workers – the active/work-oriented, the adaptive and the inactive/retirement-oriented. Based on this typology, the value attitudes of respondents, as well as their plans and expectations are described. In the final section the impact of social policy and labour market conditions on the respondents' attitudes towards work is taken into consideration. The analysis shows, unsurprisingly, that the work-oriented individuals more often continue to work behind the statutory retirement age and adopt the model of active ageing.

Konrad Turek deals with the important, although still unexplored, problem of the role of employers and the work environment in the retirement process. The article is of a theoretical character and its aim is to shed light on employers' attitudes to older employees. It suggests that the retirement process is highly affected by the relations between the employer and their employees. The crucial aspect here is the value of the employee to the employer, yet it is necessary to also look more carefully at the opportunities for working longer which the employers provide. The author suggests that the problem should not only be seen from an economic perspective, but also its analyses should include cultural aspects such as stereotypes, mental models, and knowledge.

In the next article, Katarzyna Kopycka formulates seven hypotheses about the determinants of early retirement of teachers in Poland and its regional differentiation. She claims that the employment structures in Polish public schools resemble the ideal-typical model of an internal labour market. Her analysis suggests that early retirement, which is common among teachers in Poland, is strongly influenced by organizational factors on the regional level, especially in the cohort of 55 to 59 years old. It means that this occupational group is often forced into involuntary early retirement.

Bogusława Urbaniak in her analysis *Predicted impacts of the pension reform on the labour market in Poland* deals with a problematic issue of the reform introduced in 2012 that raised the mandatory retirement age to 67 years. The analysis starts with the description of



the occupational activity of people over 50 in the Polish labour market, which is relatively low in comparison to other EU countries. In this context the public pension system reform is described. Based on the survey conducted in 2012 and the literature, the author claims that the Polish system reform will possibly increase employment of people over 50, yet it could also create an age-segmented labour market in which older workers will have to seek jobs in the secondary labour market with poor working conditions and low wages.

In the article by Márta Radó the situation of pensioners in Hungary is described. Using a longitudinal dataset the author examines the effect of retirement on perceived well-being. To measure well-being she uses subjective indicators that are based on personal evaluation of living conditions. The presented data suggests that there is a significant correlation between retirement and perceived well-being – in general retirement has a negative impact on personal well-being in comparison to people of the same age who decided to continue to work in old age.

The following article, *New pensioners and the surrounding social reality. The experience of retiring in Poland*, describes the first years of retirement and the process of adjustment to a new social status experienced by the new pensioners. In contrast to the previous articles, Katarzyna Suwada conducts her analysis based on quantitative data. The study shows that in contemporary Polish society the experience of retirement is difficult and often results in growing social isolation and lack of understanding of other people and changing social reality.

Olga Rajevska and Feliciana Rajevska discuss the Notional Defined Contribution (NDC) pension system in Latvia in their paper. They provide an analysis of 18 years of experiences with the NDC scheme in Latvia and identify its major problems in the context of other European countries. They claim that the NDC scheme has a positive impact in the long-term, yet its rapid introduction might lead to the economic polarization of the elderly.

The three last articles do not explicitly concentrate on retirement, but deal with the related issue of ageing and ageism. Anna Szafranek studies the experience of living in elderly care institutions in Poland. Her analysis is based on qualitative research conducted in nursing homes in the Podlasie region. She tracks the process that leads to (un)successful adaptation to living in an institution. The crucial aspect here is how the decision of moving to the institution was made – whether it was a pensioner's own decision, or one made by family members without consultation.

Larysa Klymanska and Iryna Boiko in the paper *Ageism stereotyping as social policy premise* discuss the issue of ageing policy in Ukraine. In particular the authors focus on prevailing intolerance to the elderly that affects the functioning of the whole system.

Finally, Elona Dhembo deals with an issue of the feminization of poverty in Albania. From a feminist perspective the author shows how the mismatch between female life cycles and public policies results in accumulated disadvantages in the lives of elderly women in Albania.

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