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Diversity management versus ageism

Manažment diverzity verzus veková diverzita

Abstract *The diversity of the employment composition partly reflects the demographic diversity. As far as employment is concerned, the age group over 55 has been especially affected recently. Retirement age is rising in Hungary similarly to Europe and employees work longer. Consequently, the above mentioned age group is becoming larger and more vulnerable to the changes in the labour market. In this paper we are going to analyze the pension rates, average earnings (per year), public pension spending, labour-force participation rates by age 55-64 (%) and pension age applied in V4 countries.*

Key words *ageism – pension - elderly population – retirement - age diversity*

Abstrakt *Rôznorodosť štruktúry zamestnanosti čiastočne odráža demografickú rôznorodosť. Nedávne opatrenia súvisiace s posunom dôchodkového veku ovplyvnili najmä vekovú skupinu nad 55 rokov. Podobne ako je tomu v Európe, i v Maďarsku sa dôchodkový vek neustále zvyšuje a zamestnanci pracujú dlhšie. V dôsledku toho sa táto veková skupina stáva početnejšou a oveľa zraniteľnejšou na trhu práce. Príspevok analyzuje výšku dôchodkom, priemernú ročnú mzdu, verejné výdavky na dôchodky, podiel pracovnej sily vo veku od 55-64 (%) na celkovej zamestnanosti a dôchodkový vek v krajinách V-4.*

Kľúčové slová *starnúca pracovná sila – dôchodok – starnúca populácia – odchod do dôchodku – veková diverzita*

Ageism is rooted in history. In order to cure this very dangerous sickness of society, the origin should be seen clearly. High compensation rates are only pain killers, which never solve the real problem. They were applied in Hungary after the transition to prevent a huge rate of unemployment. Today the situation has not been changed significantly and society does not consider senior people as an active group of society. Ageism is increasing – even citizens in their mid 30s face it already. Withdrawing somebody deliberately from the labour market, results in the deterioration of health and psychical destruction. Training and education are very important for seniors as well as for the rest of society. In work places and schools, mixed groups should be formed to enhance learning from each other and accepting each other's ideas and opinions. Due to the demographic changes, there are fewer children in the same number of schools. Teachers are unemployed, although they could train seniors for the knowledge necessary nowadays. NGOs would be able to coach seniors to strengthen their soul for a change in their lifestyle. The whole society has to fight against ageism to avoid its additional harmful impacts. It is the time to manage age! By the age management (coaching

of senior workers) there is a possibility to overcome the age-linked stereotypes. The carrier management of older worker is becoming more and more important, since the population of EU ages rapidly. The diversity management deals with this significant area.

The aging of the population is a worldwide tendency. According to the population projection for 2060, the number of persons aged 65 and over will have increased by 70% in Hungary. It means that the countries affected by this kind of projection have to be prepared for the forthcoming challenge; otherwise they will have to face dramatic social and financial problems in the near future.

Methodology

In our point of view, after examining the role of elderly people in history, we may find the answer to the question why ageism appears and how it can be eliminated. When studying ageism, first we looked into the Jewish and the Christian world, continued with the Middle Ages, went on to the 19th Century and arrived at present times.

Secondly, we determined the meaning of ageism and age discrimination and its connection with the labour market, including the suggestions given by the UN and EU specialized agencies. The employment rates of both women and men suddenly and dramatically decrease after the age of 55. This was illustrated with statistical figures in Chapter 2 where we showed the difficulties seniors have to face in the labour market of the Visegrád 4 States. Mainly because of early retirement, a majority of the active-aged people become inactive when they are relatively young, this considerably decreases labour supply. Low education, the flexible regulations of retirement and discrimination might each contribute to the inactivity of elderly people. Senior employees usually face discrimination when they apply for a position or when they are fired. Comparing the V4 States in this respect makes it possible to illustrate the seriousness of this phenomenon as well as the possible differences. We have chosen this basis for comparison because the V4 States have gone through the same economic and social changes in the past years. Chapter 3 concerned diversity management. This is a different kind of approach to the age-group concerned. With the ageing of society and the raising of retirement age, managing age diversity is becoming more and more important both in society and in the corporate practice. After that we dealt with the phenomenon of ageism and its development.

Then we analyzed the possible connection between compensation rate and ageism. We came to conclusions, came up with solutions and defined a potential research area.

The situation of elderly workers in the V4 States

Special literature mainly deals with the employment situation of the ageing population and the socio-economic burdens of their retirement. The most common issues dealt with are elderly people's state of health, their medical care, their living conditions, earnings and financial situation. (Fóti-Záhonyi, 2000, Spéder, 2002)

With the help of the statistical data shown in Table 1 we analysed and compared the status of the examined target group for 2010 in the V4 States.

Key indicators in 2010***Klíčové ukazovatele v roku 2010*****Tab. 1**

Indicators	Unit of Measurement	Czech Republic	Hungary	Poland	Slovak Republic
Average earnings (per year)	USD	16 100	13 600	14 000	12 700
Public pension spending	% of GDP	7,4	9,1	10,6	5,8
Population over age 65	% of working-age population	22,8	25,6	20,6	18,3
Population over age 65	% of total population	15,4	16,6	13,6	12,3

Source: Pensions at Glance 2011: Retirement-Retirement-Income Systems in OECD and G20 Countries ©OECD 2011

As elderly group, we mean on one hand the workers who have already reached their 65 year and carry on working while they receive their pension, and on the other hand elderly group also mean workers, who are between 55 and 64 year old, and they work until they reach the pension age. Table 1 shows that the earnings are the highest in the Czech Republic, however, their public pension spending measured in % of GDP is the second lowest. The wages and the pensions are the lowest in the Slovak Republic. The wages are the second lowest in Hungary among the examined states while pensions are higher. In Poland, the wages are the second highest and the public pension spending in % of GDP is the highest. The rate of senior people working after retirement is very similar in the examined four countries. (Besides the retirement age group, the term ‘senior people’ covers several other age-groups).

In terms of employment, Slovakia is lagging behind the other three countries a bit, although the rate of the examined senior population is the lowest in that country. The rate of the senior population is the highest in Hungary among the V4 States, which means that they are relatively the least likely to work in our country.

The Lisbon Strategy of 2000 intended to raise the employment rate of those over 55 from 40 % to 50 % in 2004-2010. Table 2 shows how the examined group of countries could meet this target.

Labour-force participation rates by age 55-64 (%)
Podiel zapojenia pracovnej sily vo veku od 55-64 (%)

Tab. 2

Country	Years				Lisbon target	Deviation from the Lisbon target
	2002	2004	2010	2011		
Hungary	26,6	31,1	34,4	35,8	50	-14,2
Slovak Republic	22,8	26,8	40,5	41,4	50	-8,6
Czech Republic	40,8	42,7	46,5	47,6	50	-2,4
Poland	26,1	26,2	34,0	36,9	50	-13,1

Source: Eurostat, Employment rate by age, 2011.

<http://appsso.eurostat.ec.europa.eu/nui/setupModifyTableLayout.do>

None of the countries could meet the Lisbon target by 2010, Hungary fell the furthest behind while the Czechs were the closest to meet the targets within the time limits. In each examined country the employment of the senior population definitely increased – although to different extends - in the examined period.

As a renewal of the Lisbon targets, the targets of EU-2020 are applicable now. Because of the failure to achieve the targets in the previous period, only meeting the general employment criteria by 2020 was defined when setting these new targets. One way of promoting the expansion of employment is changing retirement age. Table 3 shows a comparison of the V4 States in this respect.

Retirement age in the V4 countries

Dôchodkový vek v krajinách V4

Tab. 3

Country	Men				Women			
	2002	2010		2020 Expected	2002	2010		2020 Expected
		Effective	Official			Effective	Official	
Hungary	60,0	60	62	64,5	55,0	59	62	64,5
Slovak Republic	60,0	62	62	62,0	57,0	57	62	62,0
Czech Republic	60,5	61	65	62,2	58,0	59	62-65	60,7
Poland	65,0	65	65	65,0	60,0	60	60	60,0

Source: Pension at a Glance 2011

Up to 2010, the retirement age for men remained the same (while that for women changed) in Hungary. In Poland the retirement age unchanged. Retirement age for both men and women was raised in the Czech Republic, and the Slovak Republic.

In the Czech Republic the standard retirement age will be gradually increased to 65 for men under Phase 1 of the new pension reform. The pension eligibility age will be 62-65 for women, depending on the number of children that they raised. A minimum required 25 years' coverage will be gradually increased to 35 years, by one year per year from 2010.

In Hungary the statutory unisex retirement age will be increased gradually, reaching 65 by 2022. The first affected age cohort are those born in 1952.

In Poland the minimum pension age in the new system will be 65 for men and 60 for women. For the minimum pension, 25 and 20 years' contributions are required from men and women, respectively.

In the Slovak Republic the pension ages are being increased gradually. For women, the increase in retirement age is being spread over the period 2004-24. Retirement age is until the year 2017 generally set at 62 years of age which is uniform for men and women, where men are already gone in 62 years. Single women reach retirement age up to 62 years in 2024.

Concerning the effective retirement age planned for 2020, we can see that in the Czech Republic, most people will retire earlier than the official retirement age of 2010. In Hungary, because of the gradual increase in retirement age, more people will retire over the age of 62. The effective age of retirement will be nearly 65 in Hungary in 2020, which is close to the averages of the Western European countries and to those of the EU-27. In Poland and in the Slovak Republic, the targeted age limits will be reached by 2020 in accordance with the present regulations.

Seeing these tendencies of similar direction but of different steepness, we considered it important to introduce a management approach which determines management directions by focusing on diversity. Diversity management will be especially important in the near future when different generations with increasing age differences will work together.

Despite of the tendencies in Europe, that the national economies needs to hire more senior workers (because of their ageing citizens), in Hungary due to the recently implemented changes for judges' (from 70 to 62) and public servants' (62) mandatory retirement age, there will be additional workforce withdrawal from the labour market. Although the Hungarian Constitutional Court has declared it unconstitutional¹ the relevant act is still effective. This declared compulsory retirement age is against the ILO principals too, which says that the retirement has to be option instead of mandatory. Hungary wastes human capital by letting women to be retired after having 40 working years. It may results that women in their 57 years will leave the labour market as well.

Aggregate replacement ratio in the V4 countries*

Agregovaný náhradový pomer v krajinách V4

Tab. 4

Country	2005	2006	2007	2008	2009	2010
EU (27 countries)	0,51	0,51	0,49	0,50	0,51	0,53
Hungary	0,61	0,54	0,58	0,61	0,62	0,60
Slovakia	0,55	0,57	0,54	0,54	0,55	0,61
Czech Republic	0,51	0,52	0,51	0,51	0,51	0,54
Poland	0,58	0,59	0,58	0,56	0,56	0,57

*The indicator is defined as the ratio of the median individual gross pensions of 65-74 age category relative to median individual gross earnings of 50-59 age category, excluding other social benefits.

Source: EUROSTAT

http://epp.eurostat.ec.europa.eu/portal/page/portal/income_social_inclusion_living_conditions/data/main_table_s - see the referred data under Income and living conditio,. Income distribution and monetary povert,. Monetary poverty for elderly people, Aggregate replacement ratio

¹ <http://www.mkab.hu/sajto/news/the-compulsory-termination-of-the-service-of-judges-at-the-age-of-62-held-unconstitutional>

The other way of promoting the expansion of employment is decreasing the replacement ratio in connection with the pension. In the Slovak Republic there is the highest replacement ratio (0,61 in 2010). While the lowest labour-force participation among the age group of 55-64 in 2011. In the Czech Republic there is the lowest replacement ratio (closest to EUR average) and the highest labour-force participation ratio.

It has to be noted that only decreasing this ratio is not a good solution, because it might generate social problems. Decreasing replacement ratio should be accompanied by incentives, keeping the labour force in question in the labour market as long as it possible.

Promoting employment in older age and greater fairness in pensions was done in the Slovak Republic with a goal to increase the directness and fairness of early retirement. Early retirement may receive from 1 January 2011 only those people who have no income from paid work (with the exception of income on the basis of agreements on work performed outside employment), resp. not mandatory pension insurance. Early retirement is paid especially to those who do not have the opportunity to further enhance their employability and labor income. This change also applies to early retirement pensions granted before the end of 2010. This will increase the motivation of older people to remain in the labor market until they reach retirement age. The government also adopted a change in the so-called “Christmas allowance” for pensioners. Strengthened solidarity contribution and reduce the differences between the lowest and highest pensions in particular by focusing on the contribution of those with the lowest incomes.

Diversity management

The demographic movements in our society together with the globalization of the labor market highlight the significance of diversity management, which is becoming necessary in respect of workforce structure.

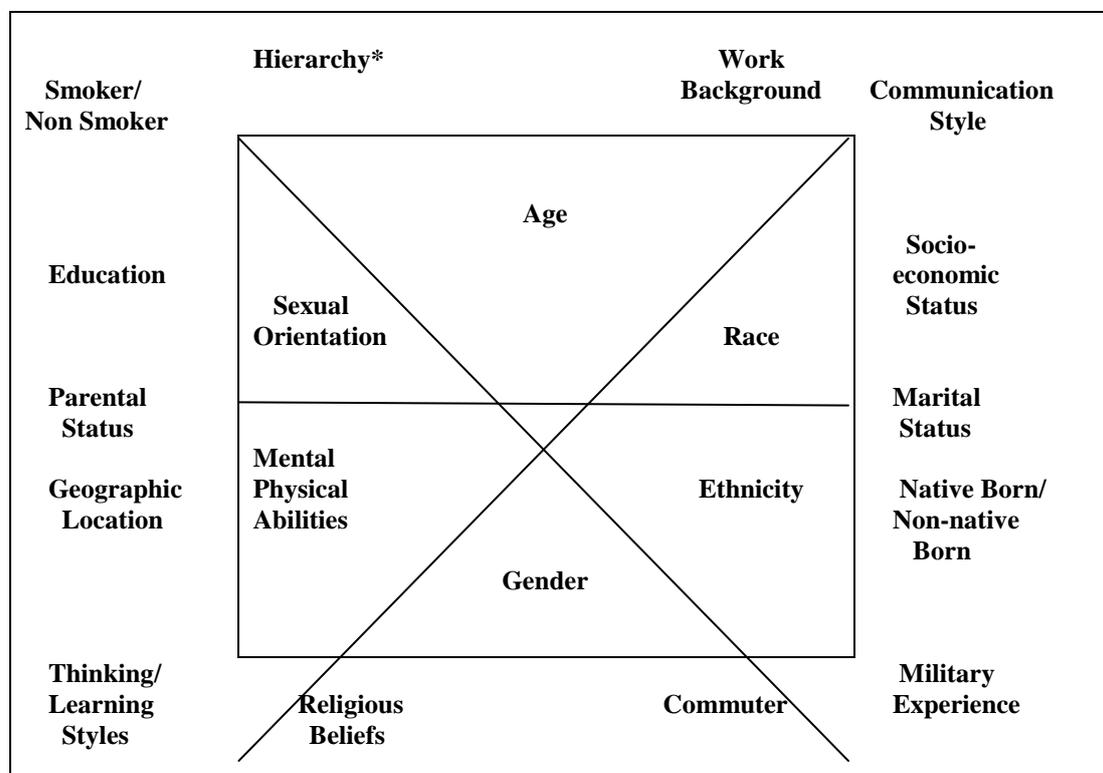
In the European Union, which is the nearest multicultural environment for us. The question of diversity management becomes a crucial priority. The EU tries to support equal opportunity management through legislative tools and also through non-legislative ones in the form of financial and institutional support (see strategy Education & Training 2010. also continuing the Diversity Journey. 2008).

Diversity can be defined as a „collective mixture characterized by differences and similarities that are applied in pursuit of organizational objectives“.

Figure 1 shows the primary and secondary dimensions of diversity.

Figure 1
Obr.1

Primary and secondary dimensions of diversity
Primárne a sekundárne dimezie rôznorodosti



Source: own work on the bases of Hubbard. 2004. pp. 27–30

*Explanation of the proposed amendment of the original Figure: Regardless of the position of the workers in question. They should be involved in the relevant decision making process. Deliberately retaining information needed for the daily work makes the employees very vulnerable and also provides stage for mobbing. Using the hierarchy just a tool of the power is against the effective operation and the new theories of management. Namely coaching instead of manage.

The inner square contains the central. Obligatory dimensions which are also included in Article 13 of the EU Treaty. These are natural unchangeable factors or attributes having a practical character. The outer (optional) dimensions can be modified to meet special corporate requirements.

Diversity is understood as one of the ways to respect variety as well as to make use of it. In the field of development and the use of human resources it has become an important and topical issue especially since the Czech Republic (CR). Slovakia (SK). Hungary (HU) and Poland (PL) entered the European Union (EU).²

² EGER Ludvík, EGEROVÁ Dana, JIŘINCOVÁ Milena, PETRÝL Jan, PLEVNÝ Miroslav, BITTEROVÁ Miriam, LANČARIČ Drahošlav, PETERKA Andrej, PISOŇOVÁ Mária, SAVOV Radovan, HAJÓS László, CZEGLÉDI Csilla, CSEH PAPP Imola, ROZWADOWSKI Jerzy, WÓJCIK Jacek: Diversity management Comparison, the best practices of Visegrad countries, International Visegrad Fund, Standard Grant No. 21110193 08/2011—07/2012, Plzen. In Press

In what follows we dealt with age diversity which is one of the forms of obligatory dimensions. Building bridges across generations remains challenging. To promote this the EU launched its framework programme “The European Year for Active Ageing and Solidarity between Generations (2012)” with the aim of raising awareness. Identifying and disseminating good practice among the Member States.

Many older job hunters especially those above 50 see ageism as their biggest problem when looking for a job. Too old, too expensive not skilled enough, poorly motivated, not mobile- stereotypes like these about older workers abound, but they could be fought effectively if companies consider the diversity of their employees (like e.g. their age-related differences in thinking) an advantage and make use of it.

In Chapter 4 we showed how the labour market handles senior age and what difficulties arise in this respect.

Ageism-Age discrimination

Some employees are classified into endangered groups on the basis of their ‘natural’ characteristics like age, gender, health condition, language, ethnicity etc. The common features of these groups are as follows:

- low position in the social structure;
- low chances of market strategy protection and as a result of all these,
- disadvantageous labour market position³.

First of all, the meaning of ageism and age discrimination should be defined. Ageism is based on social relations and attitudes in society⁴. Its source can be stereotypes or myths and it may follow Gordon Allport’s scale of prejudice:

- Antilocution,
- Avoidance,
- Discrimination,
- Physical attack,
- Extermination.⁵

Age discrimination is the third step on the scale of prejudice. The aged group of society suffers from this disadvantage, even during the job application process (Kelly Services Survey (2006-2007)).

Since the social and individual cost of age discrimination is high (the qualified aged people are not involved in the labour market), age discrimination legislation (ADL) is important. The followings are important components of ADL:

³ Csehné Papp I., Horesnyi J., Szellő J., Vincze I. (2009): Munkaerő-piaci ismeretek. Tanulmánykötet OFA - SZMMM - Szent István Egyetem Gazdaság és Társadalomtudományi Kar, (Szerk. Csehné Papp I.) Gödöllő, 86 p. ISBN: 978-963-269-092-6

⁴ http://www.ilo.org/travail/whatwedo/publications/WCMS_TRAVAIL_PUB_19/lang--en/index.htm

⁵ Allport, G. (1954): The Nature of Prejudice. Addison-Wesley

- access to employment,
- employment protection,
- encouraging organizations to address age discrimination before it happens rather than after,
- an exact age group should be determined (it is 40 years in the USA. Japan and Republic of Korea), but it is better to say that discriminating an employee on the basis of age is illegal, regardless of age – as age discrimination is becoming more and more common at the age of 35⁶.
- ADL should include several rights and responsibilities for the parties such as direct and indirect age discrimination, instruction to discriminate, harassment, which is liable for violation, access to trainings etc⁷.

UN agencies, such as ILO⁸ put the first step by the International Plan of Action on Ageing (1982 - Vienna. 2002 - Madrid), by the United Nation Principals for Older Persons (1991). The Madrid Plan identifies 35 objectives and made 239 detailed recommendations, as guiding principles for action by national governments.

The European Union member states ratified the Treaty of Amsterdam (1999). Article 13 granted EU institutions to combat discrimination, including age. On the basis of the Council Directive 2000/78/EC, on equal treatment, nearly all EU member states introduced their national discrimination law by the end of 2006.

It should also be mentioned that according to the suggestion of ILO mandatory retirement age can be regarded as age discrimination. As an alternative, “pension age” means that an older worker is entitled to state-provided, employer-provided or other form of retirement. As long as retirement age is a mandatory withdrawal from the labour market (wasting individual human capital), pension age is an option.⁹

Pension compensation rates possible connection with ageism and age discrimination

In this part of the paper, we analyzed the possible connection between compensation rate and ageism.

According to a survey on discrimination, prepared by Kelly Services Inc¹⁰, ageism is quite a new epidemic inflicting many organizations. It became institutionalized in some HR practices even during the recruitment process. People who took part in the survey were partly in the process of the recruitment, partly employed. They had to answer a series of questions concerning discrimination and were also asked to identify the types (racial. gender. age. disability and „other”) of discrimination they had incurred. In general, the answers show that

⁶ www.ilo.org/travail/whatwedo/publications/WCMS_TRAVAIL_PUB_19/lang--en/index.htm

⁷ http://www.ilo.org/travail/whatwedo/publications/WCMS_TRAVAIL_PUB_19/lang--en/index.htm

⁸ International Labour Organization

⁹ www.ilo.org/travail/whatwedo/publications/WCMS_TRAVAIL_PUB_19/lang--en/index.htm

¹⁰ Kelly’s Global Workforce Index, 2006-2007 (Kelly Services is an workforce management oriented company, since 1946. The referred survey was prepared in 28 countries, covering Europe, Asia Pacific and both North and South America. (They asked aprox. 70,000 people.)

during the application process in Hungary 65 % of the surveyed people experienced some form of discrimination. On the basis of these data Hungary is ranked 4th on the list.

Regarding ageism during the application process, Hungary comes 1st (34 %).

In the country ranking list – referring to the answers from people who were employed, the question was, if they experienced any discrimination at work – Hungary is the 4th – 51 % of the asked people experienced some form of discrimination at work. 17 % of the asked employed people complained specifically about age discrimination in Hungary - 2nd on the country list. We looked into the data of pension rates of countries. In Hungary after 37 years of employment, the pension rate will have been 75,5 % by 31 December 2012. From 2013 January this rate will be 61,05 % (based on the average income of 1988). In spite of some new measures, like increasing retirement age, changed calculation method of the first pension and the changed rules of the disability pension, there is no remarkable result in the public pension expenditure which has been increasing since 2000. It is a financial and a social issue as well.¹¹ In this paper, we analyze its social aspect.

In Hungary the average retiree left the workforce at the age of 54, creating the youngest retired population of all countries (27 countries. worldwide) surveyed (by AXA Insurance Company. in 2008). For the majority, their standard of living and quality of life declined after retirement.¹²

The figures show that there may be connection between the high compensation rate and the high rate of age discrimination experience.

But in Hungary, social insecurity – in the period of transition - also contributed to the widely used escape from the labour market to retirement. Before the transition people used to get assistance from the state and they expected the same after the transition as well.

Consequenses of the applied high pension rate and the dominant attitude

Applying high compensation rate was very attractive after the transition and the governments did not decrease it to avoid high unemployment rate and the decline of their own popularity. People found it the easiest way to survive for many years. They deliberately removed themselves from the labour market, giving surface to discrimination. The aged people's knowledge and skills in the rapidly developing sectors have been decreasing, and additionally, their health condition has deteriorated dramatically. So it seems that it has become more and more difficult to return to the labour market – not year by year – but day by day They expect support and assistance from the state but are not motivated enough to take part in trainings or education. In Hungary in 2005 4 %, in 2010, 3 % of the population between 25 and 64 took part in education or training.

The general attitude towards older people is similar to the one prevailing in the Middle Ages, where there was no social cohesion or collected fund and the only value was young appearance. The dominant social attitude is well reflected in the electronic and the traditional media, where only the young generation is adored, younger and younger people are regarded

¹¹ http://www.bankszovetseg.hu/anyag/feltoltott/HSZ6_karman_665_677.pdf

¹² http://www.axa.com/lib/axa/uploads/etudes/barometreretraite/2008/AXA_Retirement_Scope_2008_en.pdf

old. Younger and younger people are willing to undergo plastic surgery to meet false social expectations. Instead of knowledge, natural beauty, style, etc. perfect appearance is the widely accepted social value.

It also has to be mentioned that 1/4th of the government expenditure was paid for pension in 2005-2010.¹³

Learning from historical experience, not only one, but several generations do not possess the three essential factors (physical. mental. social welfare). Not even one of the three. Because of the earliest retirement age (among the above examined 27 countries), relatively old people have no savings, have physical problems and as a consequence social problems, as well.

Conclusion, possible solutions

Ageism has to be taught by qualified teachers even in elementary, secondary schools and universities, as well as in work places. The practice should be controlled (by observation and interviews) including the written rules. Old people have to be encouraged (emotionally and financially) to take part in professional and/or work related trainings and also to attend language and IT courses.

NGOs are closer to the citizens, so these organizations would be able to strengthen the target group's soul. They are also able to provide assistance by drama pedagogy which is very useful in practice.

The effective ADL has to be reviewed if it contains ILO and EU suggestions and amended in order to serve people in a better way.

The media, mainly the electronic one, has a special role in combating ageism and age discrimination. The commercials and popular TV series mustn't suggest any form of ageism or age discrimination, because people unfortunately learn mainly from this way. The National Media and Info Communication Authority have the right to monitor and this right must be exercised.

If people were educated enough, their interest group would act accordingly, but nowadays people are led by different political sides and not by their own interest. This is why the social level, extended education is very important – it is the core component of the development.

In the framework of further studies, an ageism related curriculum has to be prepared for different levels of schools and also for workplaces. In all cases, the result of TAMOP 5.5.5./08/01 Project of Equal Treatment Authority is a very useful material.

We would like to work on a so-called age discrimination index to foresee its dangers.

The multi-generational workplace is the ideal for many reasons. Workers along the age spectrum bring different skills and strengths to the table.

¹³ http://www.bankszovetseg.hu/anyag/feltoltott/HSZ6_karman_665_677.pdf

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