



Hochschule
Zittau/Görlitz
UNIVERSITY OF APPLIED SCIENCES

“The Future of Welfare in Central and Eastern Europe in Times of Rapid Demographic Ageing“

*JPI “More Years, Better Lives” Conference
“Demographic Change in Central and Eastern Europe”*

24 March 2015 in Vienna

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Outline

1. Demographic ageing in CEE until mid 21st century
2. Is there a CEE welfare state regime?
3. Making the case for regional ageing policies
4. Discussion of future welfare needs in CEE
5. Key challenges for CEE societies / welfare states by 2030 and 2050



1.

Demographic ageing in Central and Eastern Europe until mid 21st century

Tomás Sobotka on „Demographic Shifts since 1989“

- Tomás Sobotka reminded us of the main demographic changes since 1989:

Effects of ‘drivers of demographic change’:

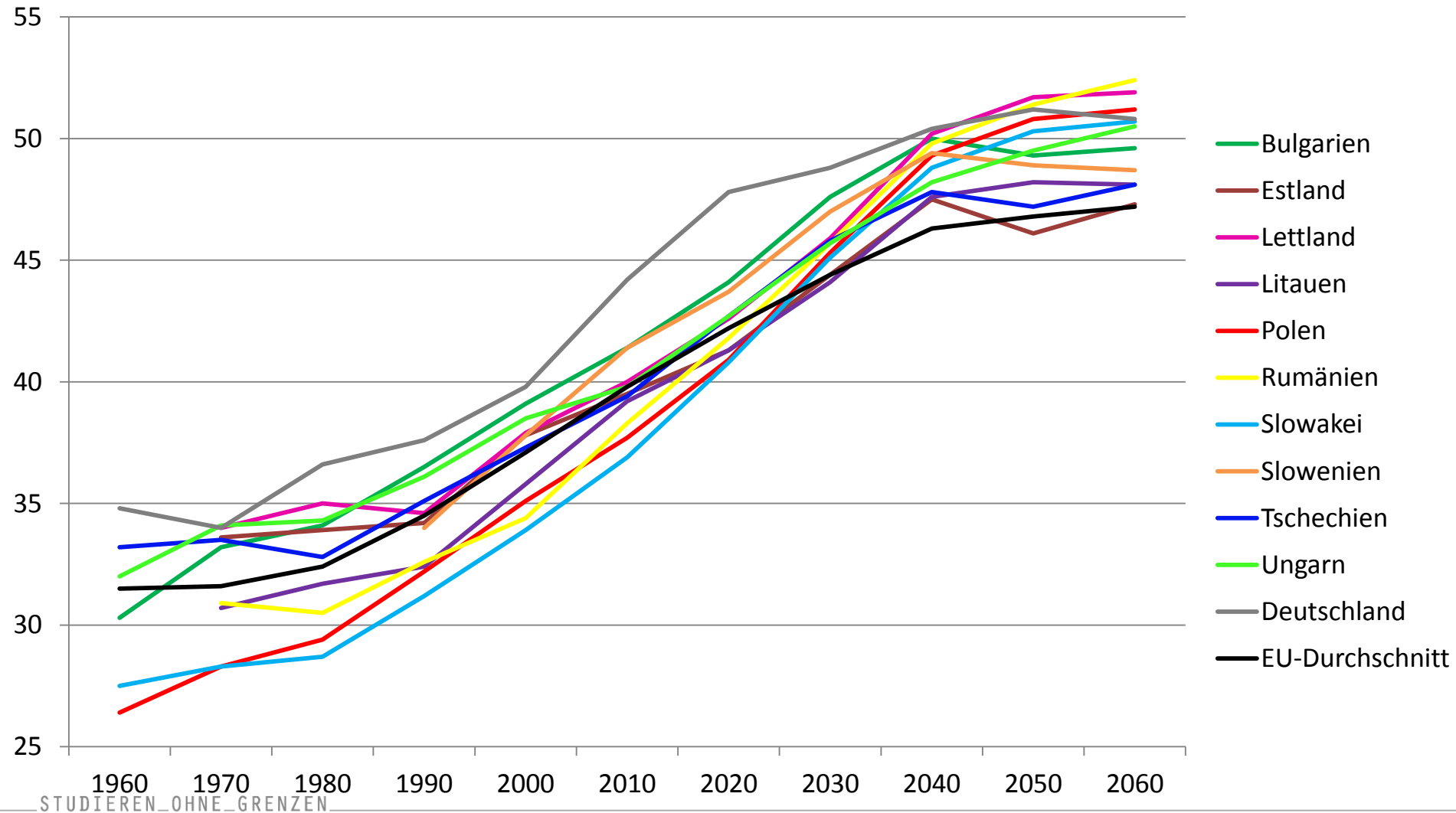
- Massive drop in fertility during 1990s across CEE
- Rising life expectancies in CEE, but mainly in Central Europe – less so in E & SE
- Enormous outmigration (of the young) from CEE, even more so from E & SE parts
 - ⇒ **Population ageing**
 - ⇒ **Sobotka emphasized variation across CEE – BUT I’d argue still similar trends in demographic ageing due to fertility, variation mainly in mortality / migration**

Sobotka on underlying causes:

- Westernization of family norms and fertility behaviour
 - ⇒ traditional family norms under pressure
 - ⇒ increasing plurality of family forms
 - ⇒ postponement of (first) births
- Some differences continue to persist
 - ⇒ still trad. gender roles earlier child birth in E & SE than in Western Europe
 - ⇒ stigmatisation of childlessness
- (Family) Policy responses unsystematic and inadequate so far
 - ⇒ **unrealistic, pro-natalist rhetoric**

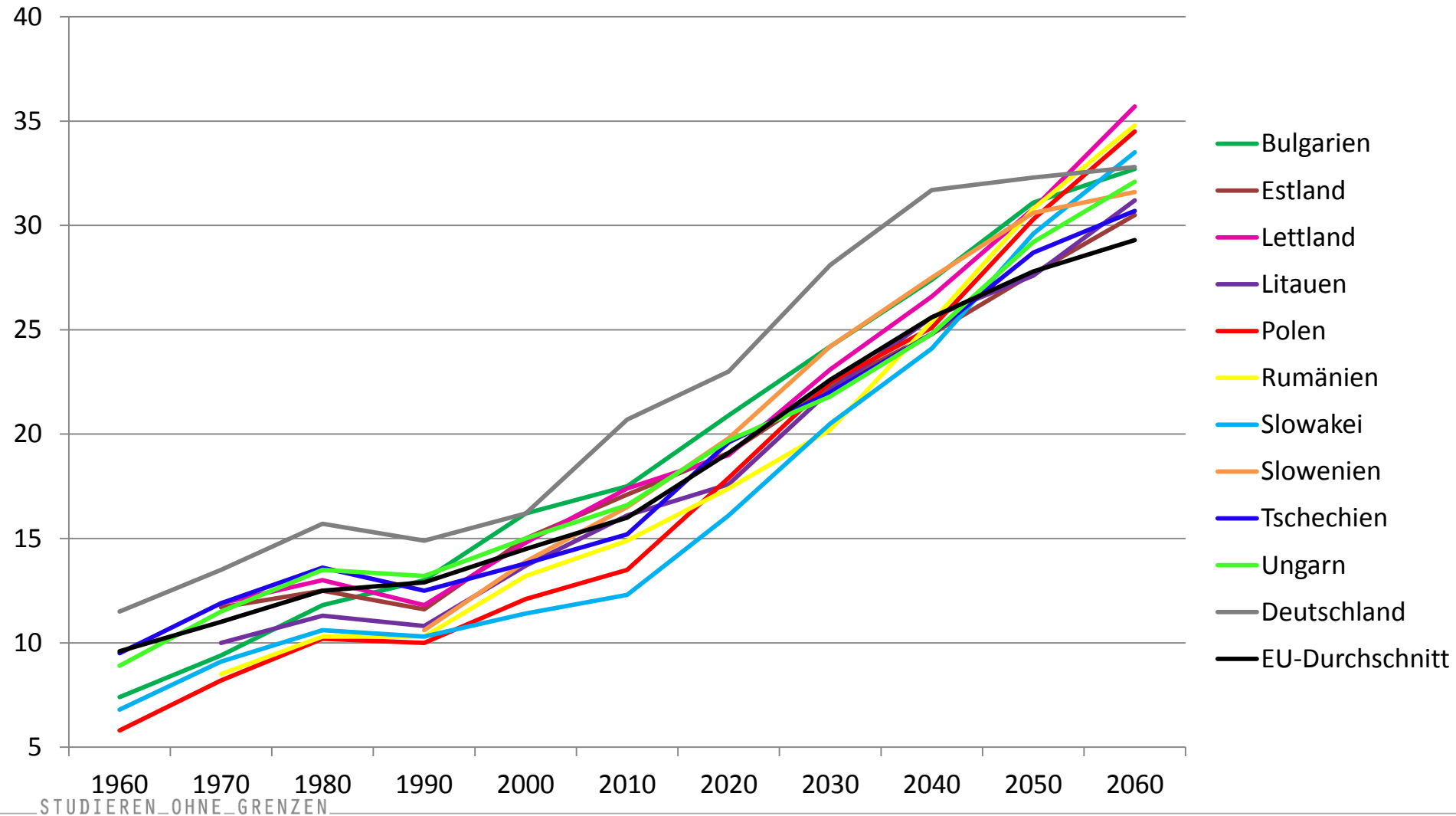


Median age of the population 1960-2060 *(Eurostat 2011a)*



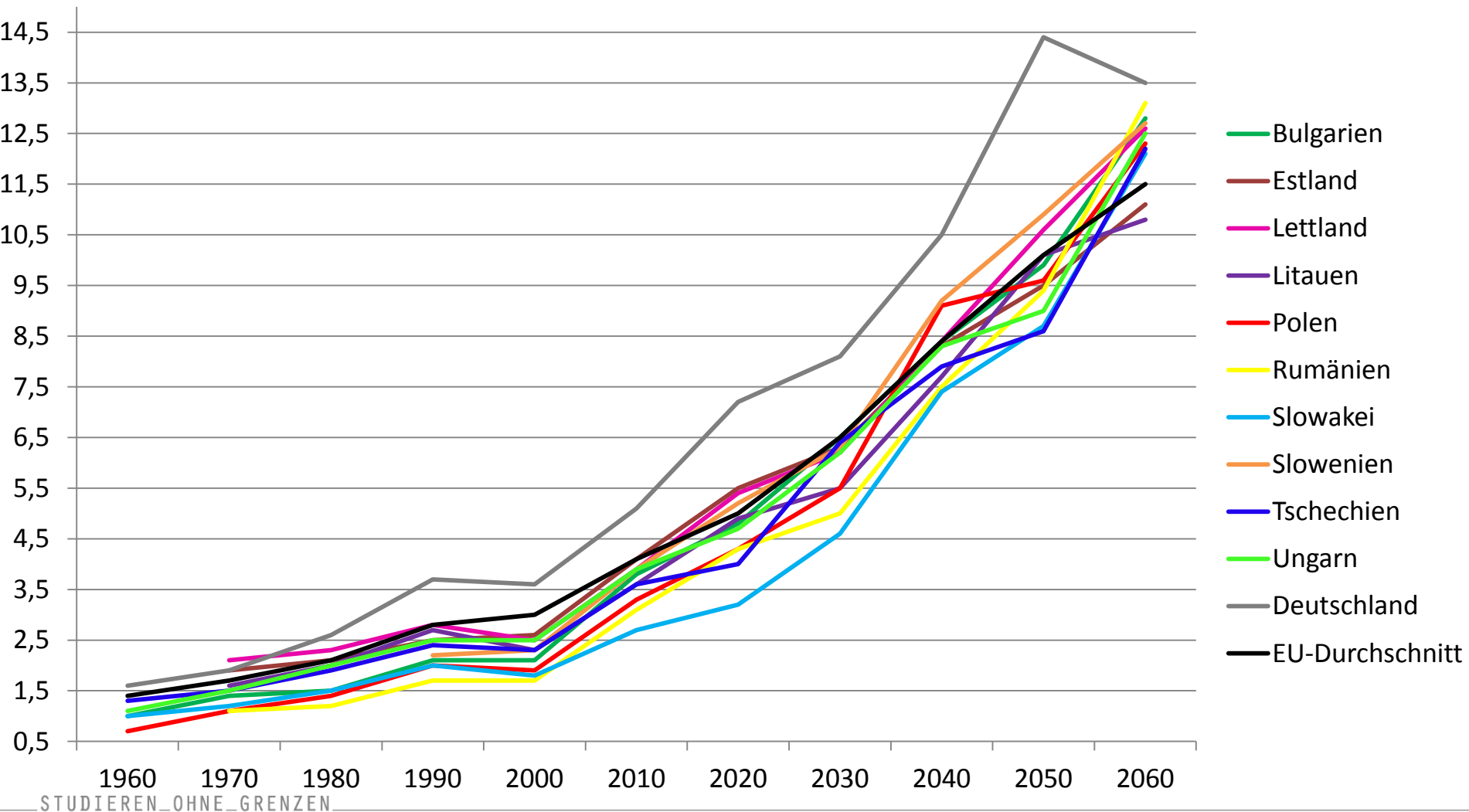


Share of older people (65+ years) 1960-2060 *(Eurostat 2011a)*



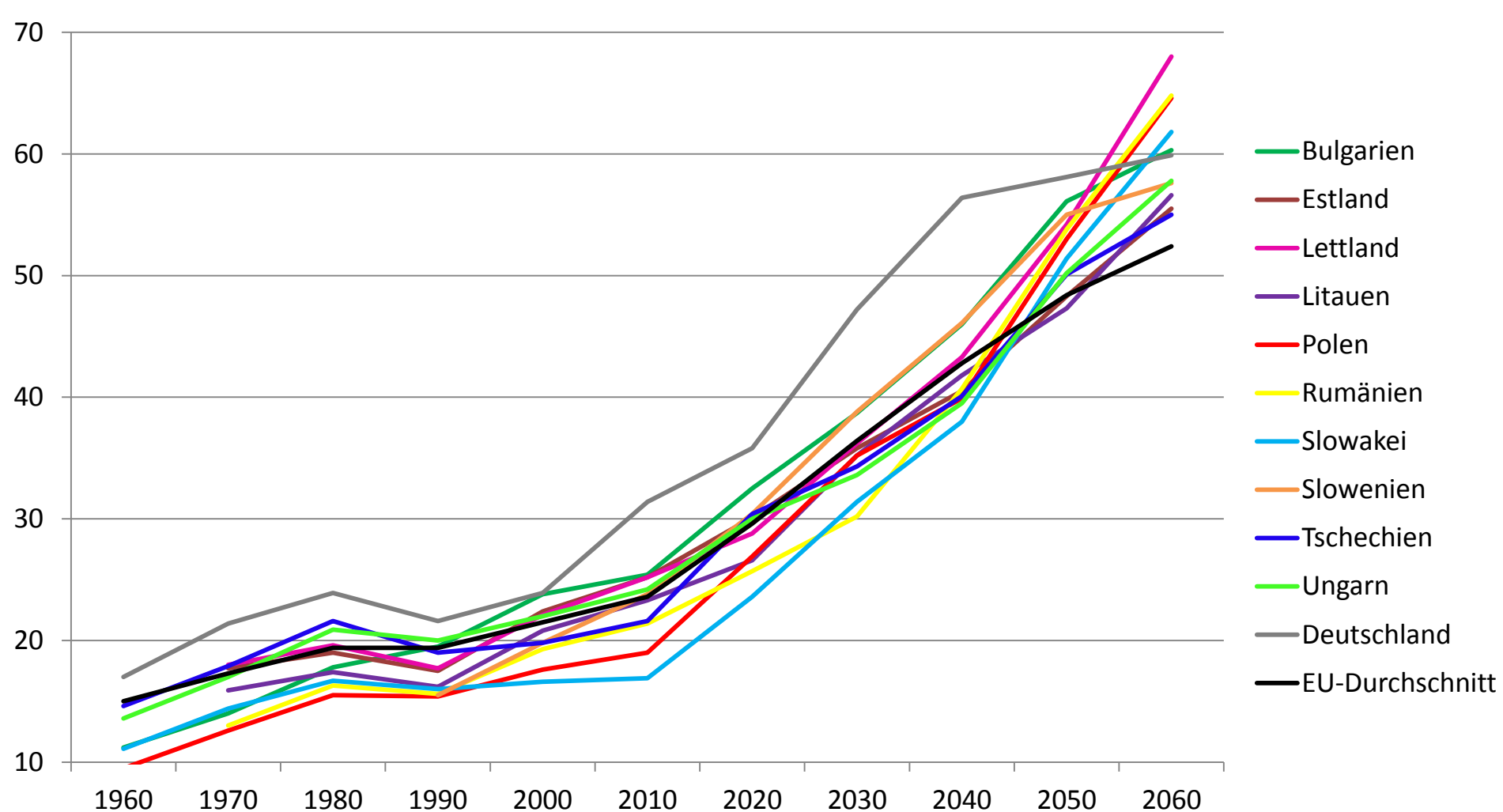


Share of the oldest old (80+ years) 1960-2060 *(Eurostat 2011a)*





Old-age dependency ratio (65+ vs.15-64) 1960-2060 *(Eurostat 2011a)*





OVERVIEW



FROM RED TO GRAY

*The “Third Transition”
of Aging Populations
in Eastern Europe and
the Former Soviet Union*



THE WORLD BANK



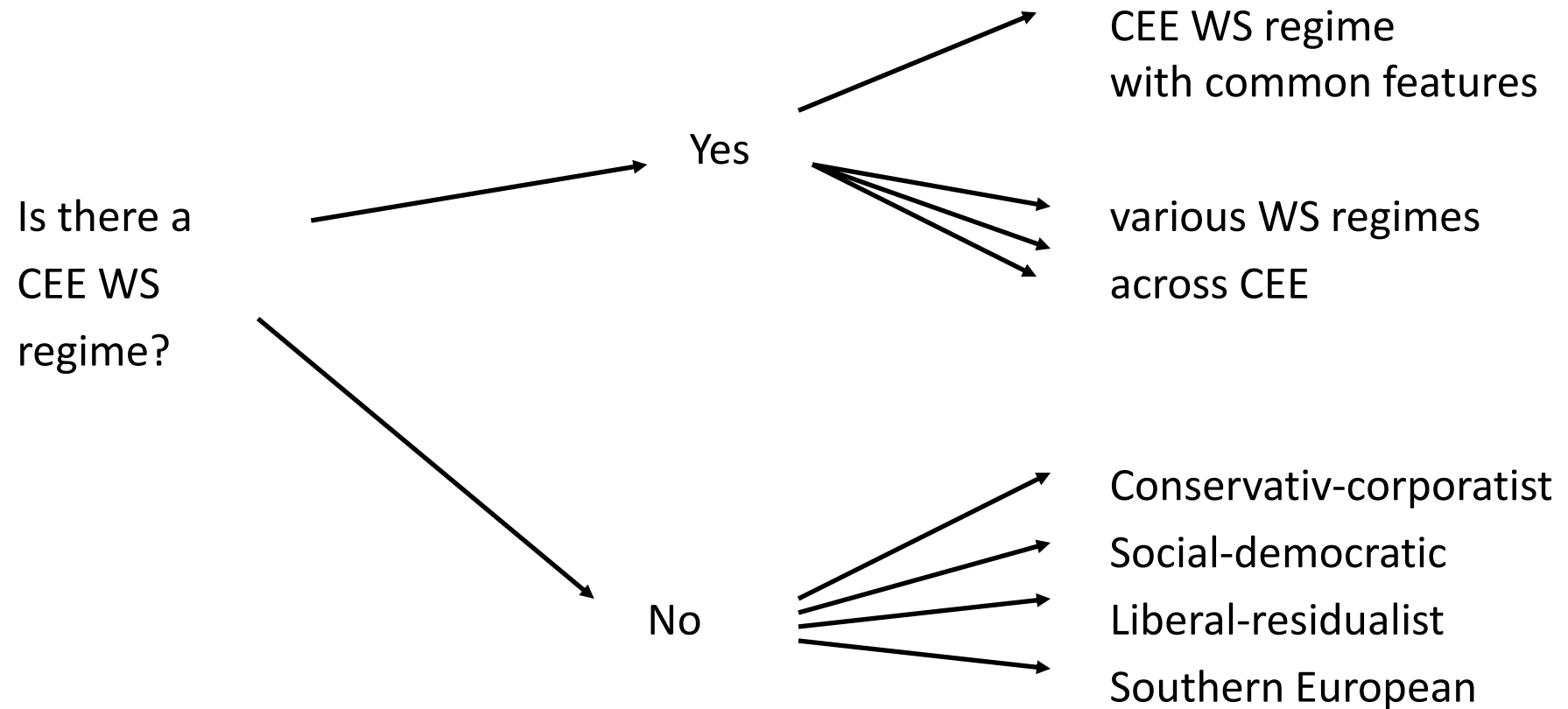
2.

Is there a CEE welfare state regime?

Welfare state regimes	Examples	Characteristics
Liberal-residualist WS (Esping-Andersen 1990)	USA; GB, IRL	<ul style="list-style-type: none"> - Market solutions have priority - Social security at low level
Social-democratic WS (Esping-Andersen 1990)	S, DK, FIN, N	<ul style="list-style-type: none"> - State solutions have priority - Comprehensive social security
Conservativ-corporatist. WS (Esping-Andersen 1990)	D, FRA, NL, BEL	<ul style="list-style-type: none"> - Family solutions have priority - Social security dep. on social status
Southern-European WS (Ferrara 1996)	ITA, SP, GR, P	<ul style="list-style-type: none"> - Family solutions have priority - Social security at low level
Eastern-European WS (Deacon et al. 1992)	PL, CZ, HU, BUL	<ul style="list-style-type: none"> - Family as last resort - Social security at low level



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Pieter Vanhuysse on “CEE welfare pathways since 1989”

- Pieter Vanhuysse argued that there is no unitary common CEE welfare state
- focused on Visegrad countries
- He briefly pointed out low-activity culture for older people in communist societies
 - ⇒ What are implications today?
 - ⇒ To what extent does ‘active ageing’ paradigm work in CEE?
- Fascinating evidence that Visegrad countries “overshoot” in terms of pension spending – relative to GDP they spend more on pensions than aged societies in Europe although relatively young still
- He argues that this has happened at expense of growing intergenerational imbalances
 - ⇒ Is there prospect of intergenerational conflicts?
- Accelerating population aging likely to constrain Central European policymakers’ choices and to strengthen the pro-elderly direction of welfare state pathways – new incentive for the young to emigrate?



3. Making the case for regional ageing policies

What is regional ageing? *(Beetz et al. 2009)*

- Significant regional and local variation in population ageing as well as context factors
- Concept of ‘regional ageing’ considers variation in local environment and socio-spatial context
 - ⇒ specific focus on infrastructural variation
- Why do some regions age more rapidly than others?
- To what extent do older peoples’ living conditions vary across regions / municipalities?
- What can be done about this?
- Do national policies work at regional level? In which contexts / places do they work better or worse in some?
- Traditional spatial categories loose explanatory power (e.g. province, district/county, municipality)
 - ⇒ people identify with even smaller spatial categories, such as borough or neighbourhood

Growing cross-regional inequalities (*Beetz et al. 2009*)

1. Polarisation

- Growing differences in living conditions, housing, employment, consumption, cultural, infrastructural conditions across regions
⇒ particularly pronounced metropolitan vs. remote rural areas

2. Peripherisation

- Concentration of social, economic, cultural and political resources and opportunities in some areas / regions
- Decision-making in metropolitan urban areas with little understanding for needs of (remote) rural areas
- Migration aggravates this situation
- ➔ Polarisation of development opportunities and risks
- **Remote rural regions see above-average population ageing - below-average pop. ageing in economic, political, cultural centres**
⇒ **Need for regional ageing policies + greater role of regions in policy-making and resource redistribution**



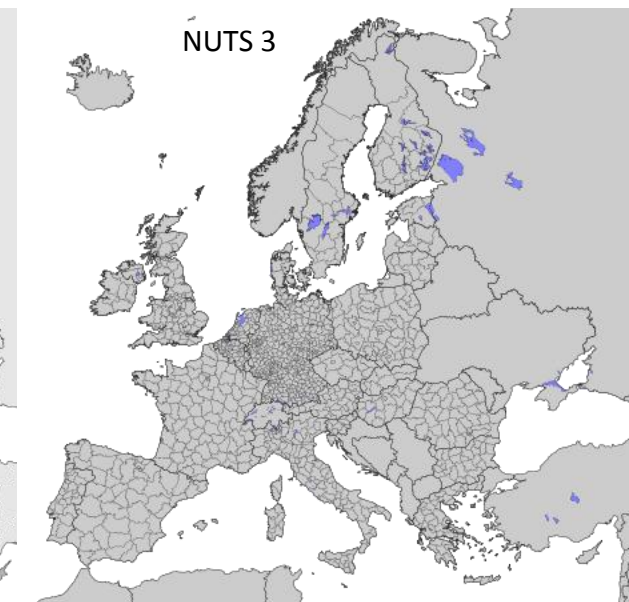


3.1

Regions within countries

European NUTS regions *(Eurostat 2015)*

- NUTS = Nomenclature of Territorial Units for Statistics
- Developed by Eurostat in 1980 for purpose of cross-regional comparison
- = Closely linked to spatial administrative units in EU member states
- NUTS 0 = national level
- NUTS 1 = major socio-economic regions (e.g. provinces)
- NUTS 2 = basic regions for application of regional policies (e.g. subunits of prov.)
- NUTS 3 = small regions for specific diagnosis (e.g. districts, counties)



Relative population change between 2008 and 2030, by NUTS 2 regions

Per 100 inhabitants

EU27 = +5%

- ≤ -6%
- 6% – ≤ +5%
- +5% – ≤ +15%
- > +15%
- Data not available

Source: Eurostat, EUROPOP2008 Regional population projections
© EuroGeographics Association, for the administrative boundaries
Cartography: Eurostat — GISCO, 12/2009

0 500 km

Eurostat (2010)

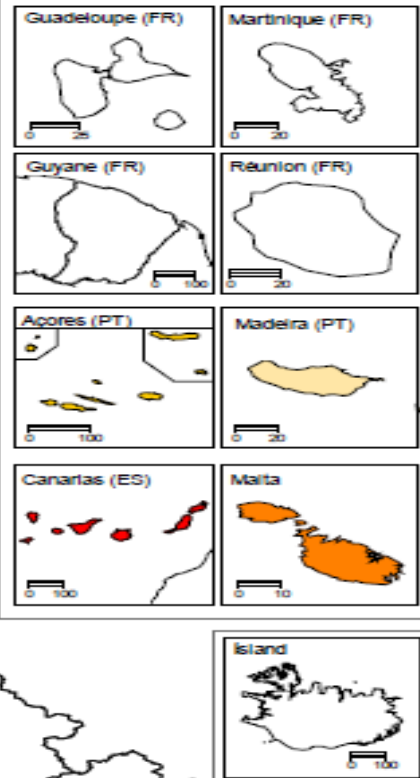
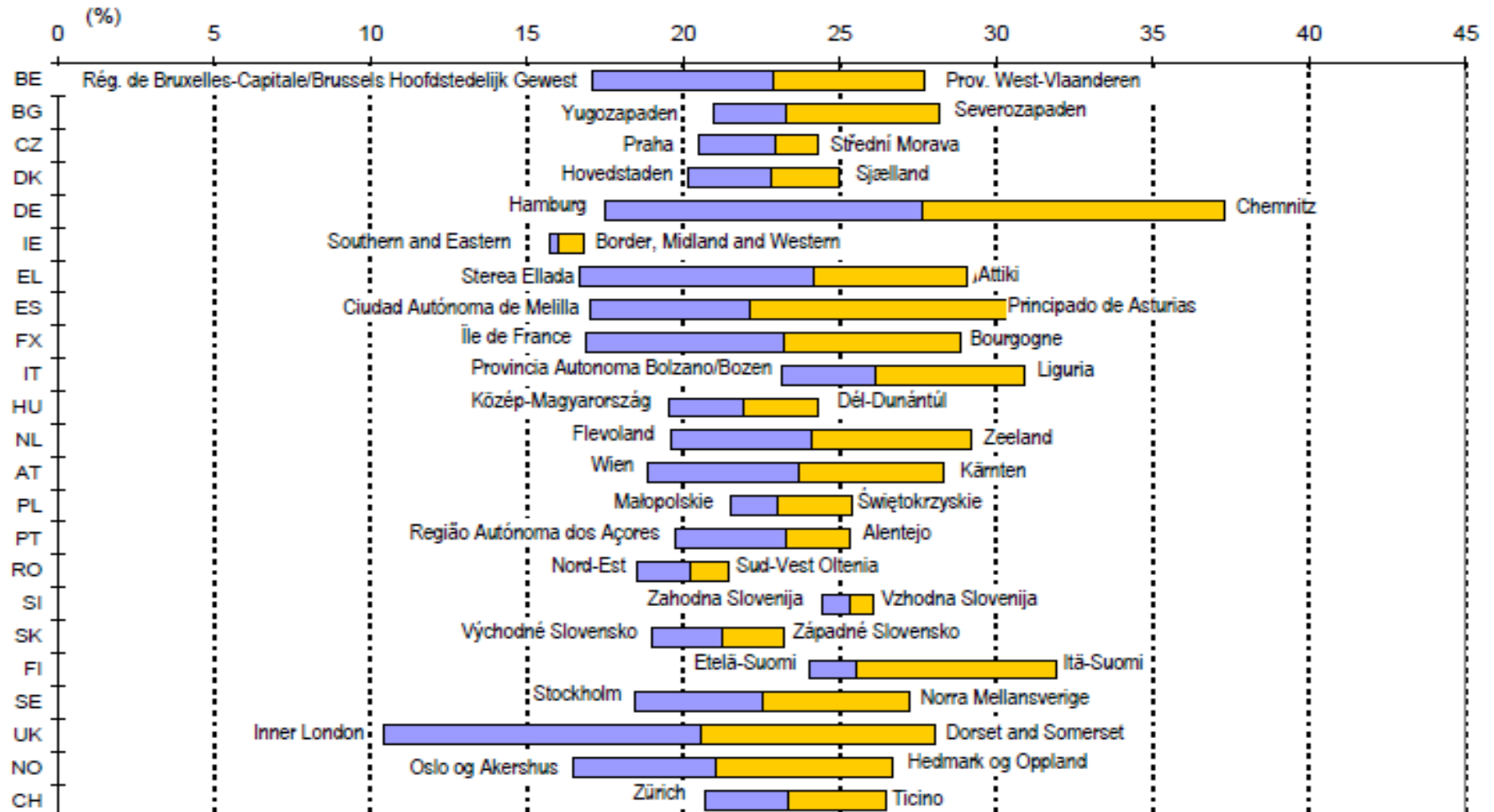
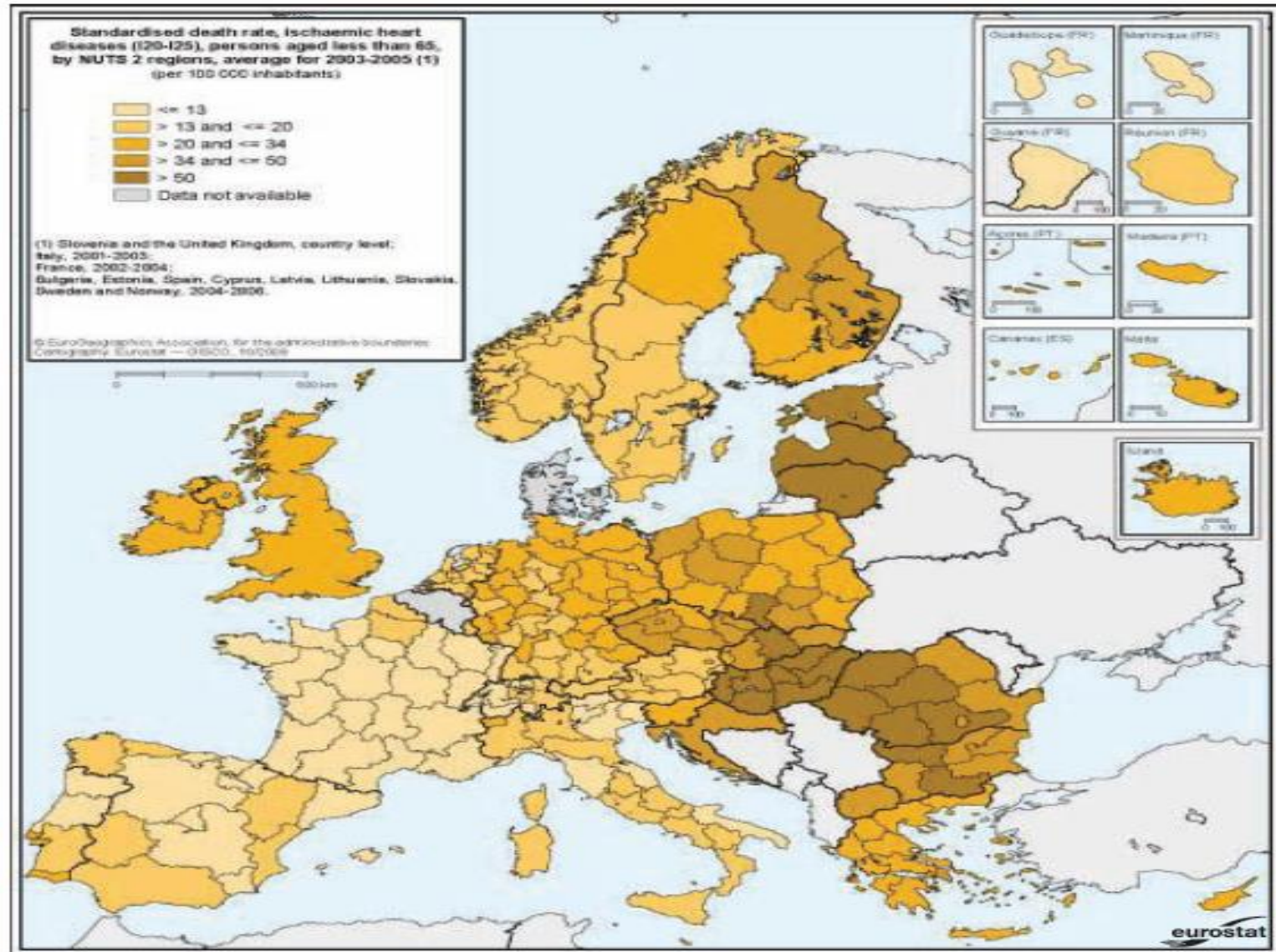
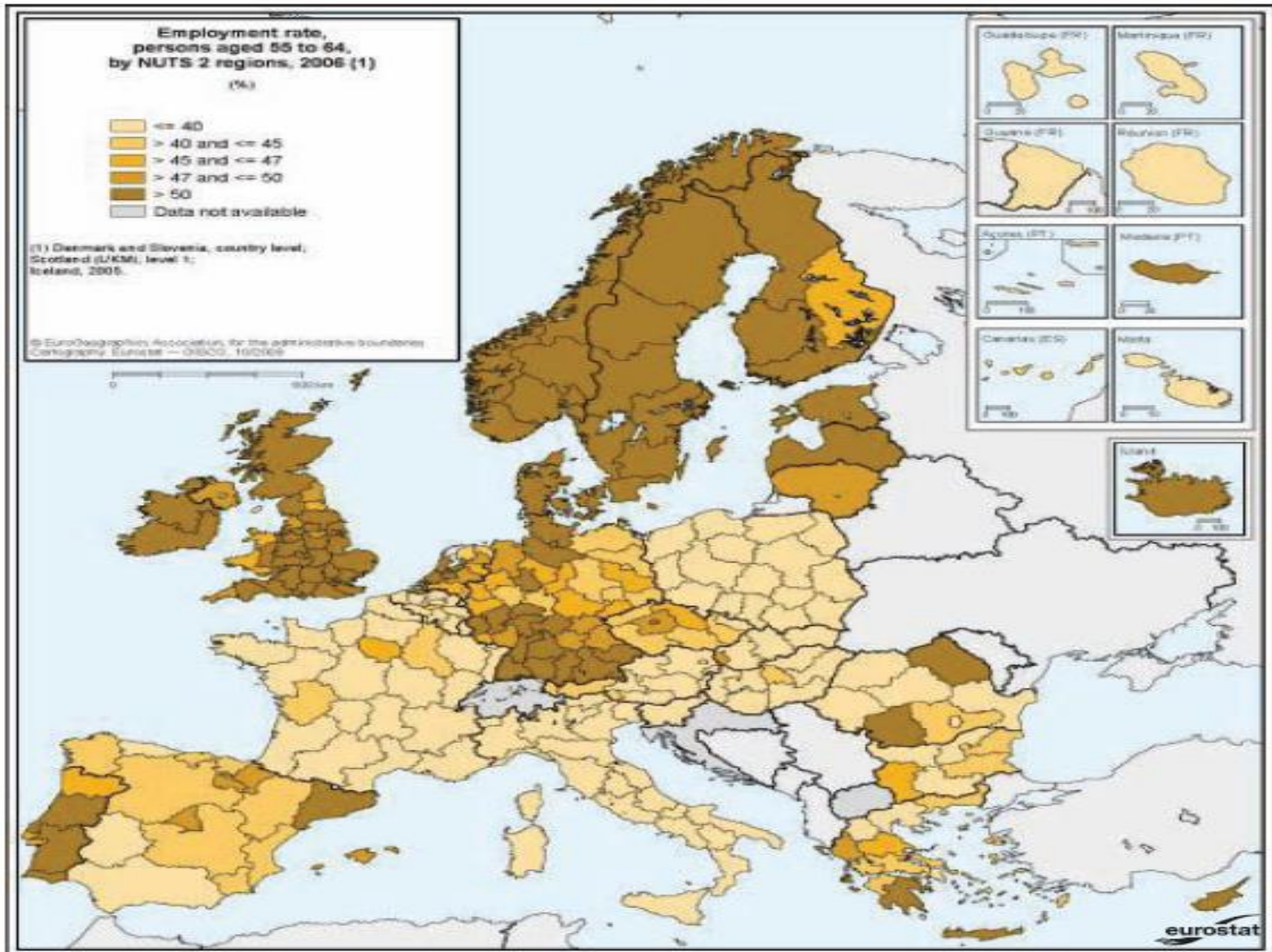


Figure 4: NUTS level 2 regions with the highest / lowest proportion of people aged 65+ in the total population in 2030

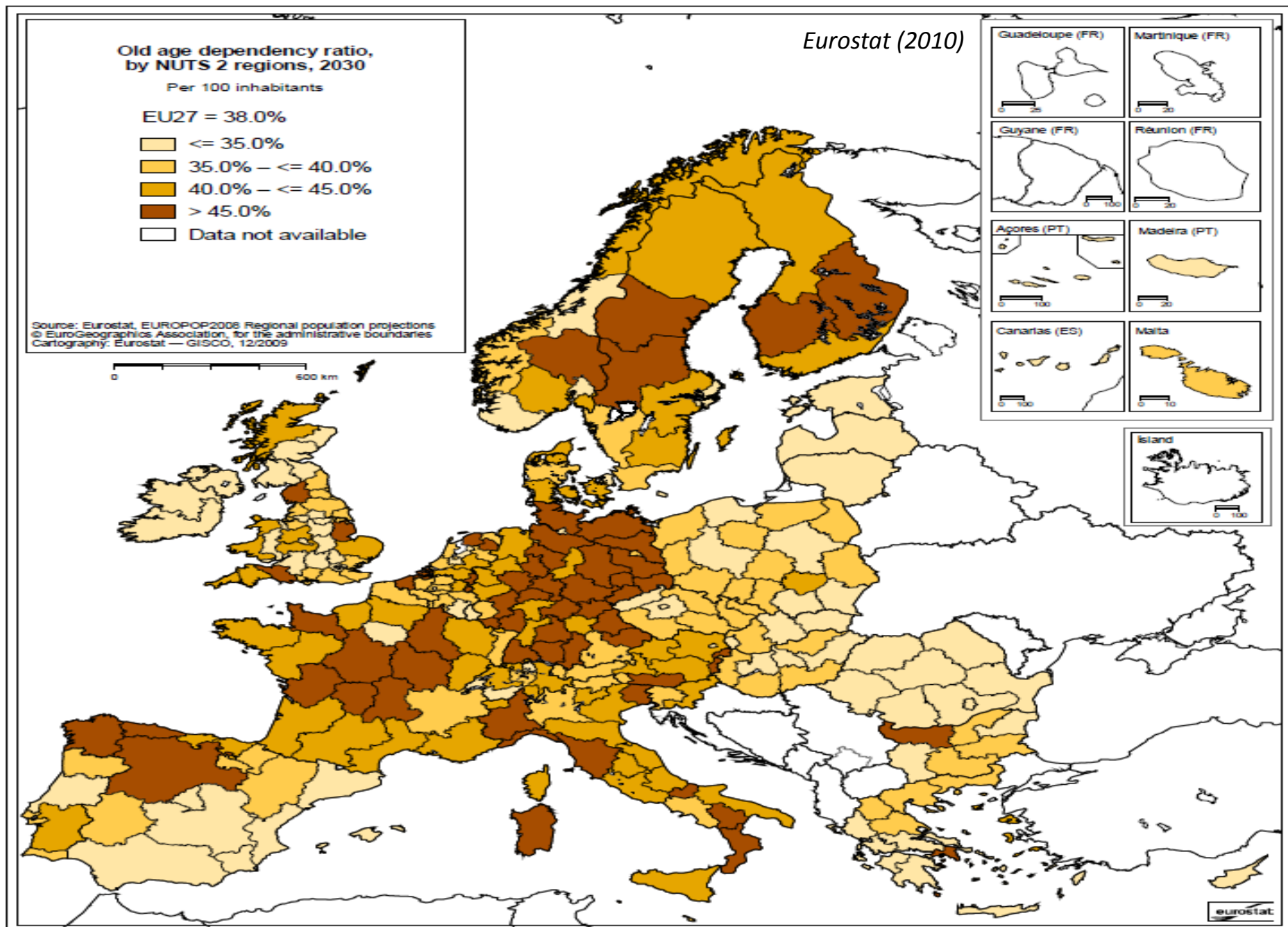


Eurostat (2010)





Map 2: Old age dependency ratio by NUTS 2 regions, 2030



For Norway and Switzerland level 2 statistical regions

Source: Eurostat, regional EUROPOP2008



3.2

Transregional instead of international development

Historical transregional links

- Instead of focusing on inter-national and inter-regional (in sense of administrative sub-units of European nation states) re-discover older transregional links preceding European Union and welfare state
- This is not about lost or past empires or new imperialism
 - ⇒ It is about exploring historical / cultural links older than nation states
 - ⇒ It is about historical / cultural identities cutting across contemporary national borders
- Origins of Central-Eastern European concept can be traced back to Maciej von Miechów (1457-1523) in Kraków (Augustynowicz 2010)
- Tornow (2011) identified 527-823 as period of Slavonic settlement, which cuts across today's national borders
- **Re-discover traditional transregional, cross-border links!**
- **Form new “pragmatic” transregional, cross-border links, for example to share expenses for care provision infrastructure!**
 - ⇒ For example, build one geriatric care hospital caring for older people across country borders instead of two or three!





Görlitz (Polish: Zgorzelec, Upper Sorbian: Zhorjelc, Lower Sorbian: Zgóřjelc, Czech: *Zhořelec*) is the easternmost city in Germany, located on the Lusatian Neiße river in Saxony. It is opposite of the Polish town of Zgorzelec, which was part of Görlitz until 1945.

As a small Sorbian village named *Gorelic* in the region of Upper Lusatia it was temporarily conquered and held by the Kingdom of Poland during [Bolesław I Chrobry](#)'s invasion of Lusatia between 1002 and 1031, after which the region fell back to the March of Lusatia under the counts of the Margraviate of Meißen. *Goreliz* was first mentioned in a document in 1071 by the German King, and later Emperor of the Holy Roman Empire, Heinrich IV. Around 1072 the village was assigned to the Duchy of Bohemia.

The origin of the name Görlitz is derived from the Slavic word for "burned land", referring to the technique used to clear land for settlement. In the 13th century the village gradually became a town. Due to its location on the Via Regia, a medieval trade route, the settlement prospered. Görlitz belonged to Saxony since 1635. However, at the Congress of Vienna in 1815, Görlitz and some other parts of Lusatia were integrated into the Prussian Province of Silesia.

(From Wikipedia)



4. Selected policy areas

Labour markets and older workers

- Economic inactivity of people aged 50+ crucial problem
 - ⇒ immediate negative consequences in terms of income, social inclusion and mental illnesses (e.g. depression)
 - ⇒ future negative implications in terms of pension income
- *Kremena Borissova-Marinova* pointed out key dimensions using Bulgarian case
 - ⇒ presented analysis of variation by gender, age, marital status, education, and place of residence
- *Boris Majcen* supports this case with his analysis of low employment rates of older people in Slovenia and high early exit rates from economic activity
- Introduction of Slovenian government's initiative promoting active ageing following line of EU policies: major labour market reforms, some pension reform
 - ⇒ EU Lisbon agenda of raising employment rates of older workers (55-64 years) to more than 50 per cent by 2010
 - ⇒ “European Year of Active Ageing & Solidarity between the Generations” (2012)
- *Majcen* makes case for integrated ‘active ageing’ policy
- *Roland Verwiebe* discusses cross-border labour migration as means of escaping unfavourable labour markets for older workers
 - ⇒ focus on role of social networks in coordinating such moves

**Employment rates⁴ by age groups
(%)**

	2000				2010			
	Aged 20-64	Aged 55-59	Aged 60-64	Aged 65+	Aged 20-64	Aged 55-59	Aged 60-64	Aged 65+
EU27	66.5	50.3	23.0	5.0	68.6	60.9	30.5	4.7
Belgium	66.3	37.9	12.4	1.6	67.6	53.1	20.2	2.0
Bulgaria	56.5	33.5	10.5	2.9	65.4	62.2	26.6	2.8
Czech Republic	70.9	50.2	16.9	4.1	70.4	67.1	25.2	4.7
Denmark	77.9	72.6	30.9	2.5	76.1	75.9	39.6	6.2
Germany	68.7	56.4	19.6	2.6	74.9	71.5	41.0	4.0
Estonia	67.4	58.6	29.9	7.5	66.7	63.1	42.8	8.3
Ireland	70.1	53.1	35.8	8.1	64.9	58.8	40.2	8.6
Greece	62.1	48.4	31.9	5.3	64.0	53.9	30.5	4.0
Spain	60.6	46.2	26.7	1.6	62.5	54.4	32.0	2.0
France	67.4	48.1	10.2	1.1	69.1	60.6	17.9	1.6
Italy	57.1	36.5	18.0	3.1	61.1	52.7	20.5	3.1
Cyprus	72.0	60.6	35.3	10.3	75.4	69.7	41.9	12.9
Latvia	63.4	49.3	21.8	6.6	65.0	64.3	29.4	5.6
Lithuania	66.1	56.2	25.8	7.8	64.4	61.1	33.8	4.5
Luxembourg	67.5	38.9	14.5	(1.6)	70.7	55.7	20.1	(3.4)
Hungary	60.9	33.7	7.6	1.7	60.4	51.7	13.0	1.9
Malta	57.5	45.3	(10.8)	:	60.1	49.3	14.2	(3.5)
Netherlands	74.2	54.1	18.5	2.6	76.8	70.1	37.3	5.9
Austria	70.7	42.4	12.1	2.9	74.9	61.0	22.3	5.3
Poland	61.1	37.7	20.9	7.6	64.6	45.8	19.1	4.7
Portugal	73.4	57.7	44.7	18.0	70.5	57.8	40.2	16.5
Romania	70.5	56.6	48.0	38.2	63.3	50.2	29.5	13.0
Slovenia	68.5	29.0	15.1	7.4	70.3	46.9	19.5	7.3
Slovakia	63.0	34.5	6.1	0.8	64.6	57.9	17.2	1.6
Finland	72.3	58.5	22.8	2.3	73.0	72.5	40.8	4.1
Sweden	76.3	78.6	46.0	4.9	78.7	80.7	61.0	6.3
United Kingdom	73.9	63.2	36.1	5.2	73.6	70.8	44.0	8.5

() Data with reduced reliability due to sample size

:

Eurostat (2012)

Social protection in ageing societies

- Presenters in panel on ‘social protection’ highlighted crucial importance of adopting **life course perspective** for understanding **generational risks / benefits**
- *Robert Gal* adopted meta perspective by considering resource allocation across generations using Hungarian case
 - ⇒ Does the welfare state favour certain generations? Do certain generations benefit more than others?
 - ⇒ Gal argues future pensioner generations have to cope with ‘lifecycle deficit’
 - ⇒ Argument was made elsewhere (e.g. Willetts 2010 for UK ; Klöckner 2005, Kuntze 2014 for Germany) though authors blame these generations for taking advantage of welfare states and their children’s / grandchildren’s SI contributions
 - ⇒ **Prospect of intergenerational conflict?!**
- *Agnieszka Chłoń-Domińczak* added observation that timing of labour market entry and of pension reforms determines individual gains or losses – once again, life course and generation crucial
 - ⇒ relative to GDP Poland spends more on pensions and social security for older people than expected given its (still) relative young population structure
- *Paul Stubbs* provided excellent account of various pension reform phases in Croatian case and highlighted long-term implications

Reminder of correlation between public and private transfers

- Historically, older people relied on material support from their children
 - ⇒ financial transfers upward i.e. from the younger to the older generation
- The post-war welfare state extension and pension reforms changed that completely
 - ⇒ linking pension benefits to wage increases resulted in much higher pensions
 - ⇒ lesser need for financial support
 - ⇒ older generation was enabled to support younger generation financially (Attias-Donfut, Ogg & Wolff 2005; Daatland & Lowenstein 2005; Kohli 1999)
 - ⇒ although effect less pronounced in CEE noticeable there too
- **Good public pension system = effective means of poverty prevention for both the older and the younger generation**

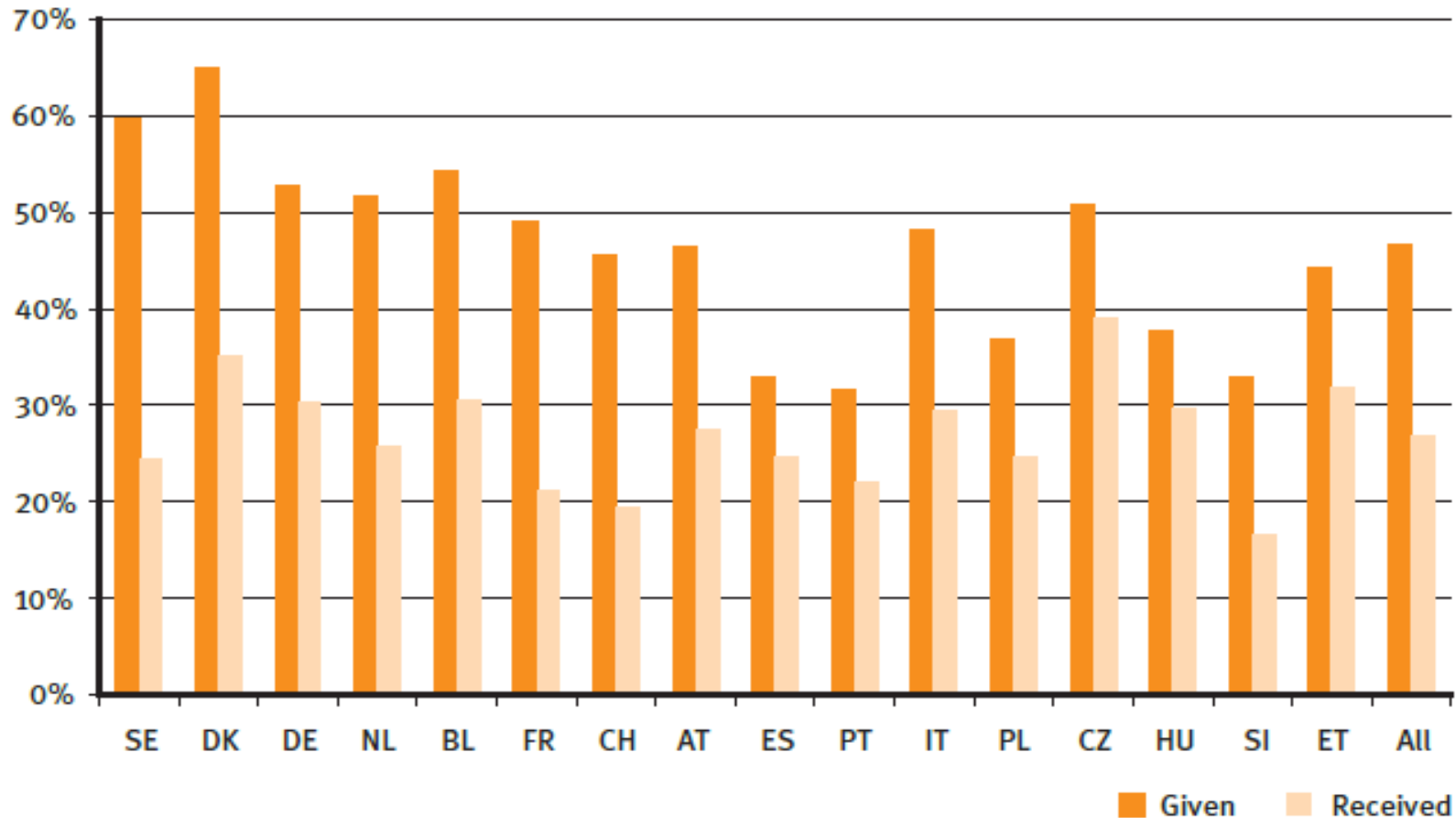


Figure 33.1: Rates of practical and/or financial help by country at Wave 4

Source: SHARE Wave 4 release 1. Respondents aged 50 and above. Weighted data (individual).
Unweighted base n=56,854.

Ogg & Renaut (2013)

Whose responsibility is care-giving?

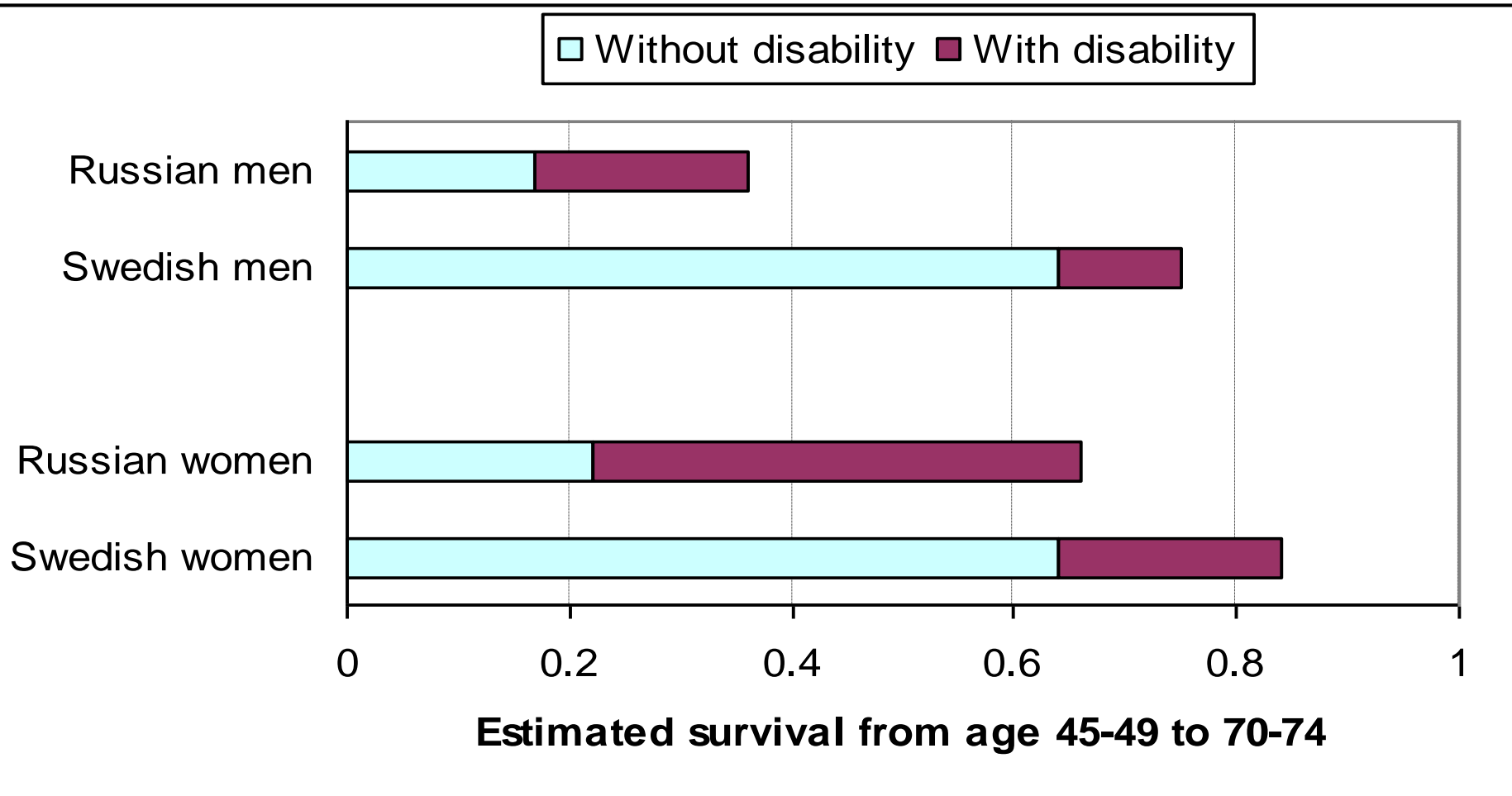
- *Cornelia Muresan* argued that filial obligation in care-giving is much more common in CEE and Southern Europe than in Northern or Western Europe
- In her analysis, she was scrutinizing personal care, instrumental support, emotional support, and financial support in 7 CEE countries based on GGS data
 - ⇒ concluded that traditional norms were strongest in regard to personal care + financial support
- *Miloslav Bahna* focused on another aggravating factor for CEE: the ‘care drain’ towards Western Europe using example of Slovak migrant care workers in Austria
 - ⇒ discussion of implications for ‘sending country’ Slovakia
 - ⇒ he argues that push-factors in sending country (e.g. employment chances) more important than pull-factors (e.g. welfare legislation) in host society
- *Zsuzsa Széman* focused on home care services in Hungary
 - ⇒ recent cuts of funding the service may put it at risk
 - ⇒ she argued that assistive technologies may become integral element of home care to improve social integration / social inclusion (e.g. Skype based communic.)
 - ⇒ another innovative approach would link education, labour market and home care to form integrative services combining technology and human care



Health

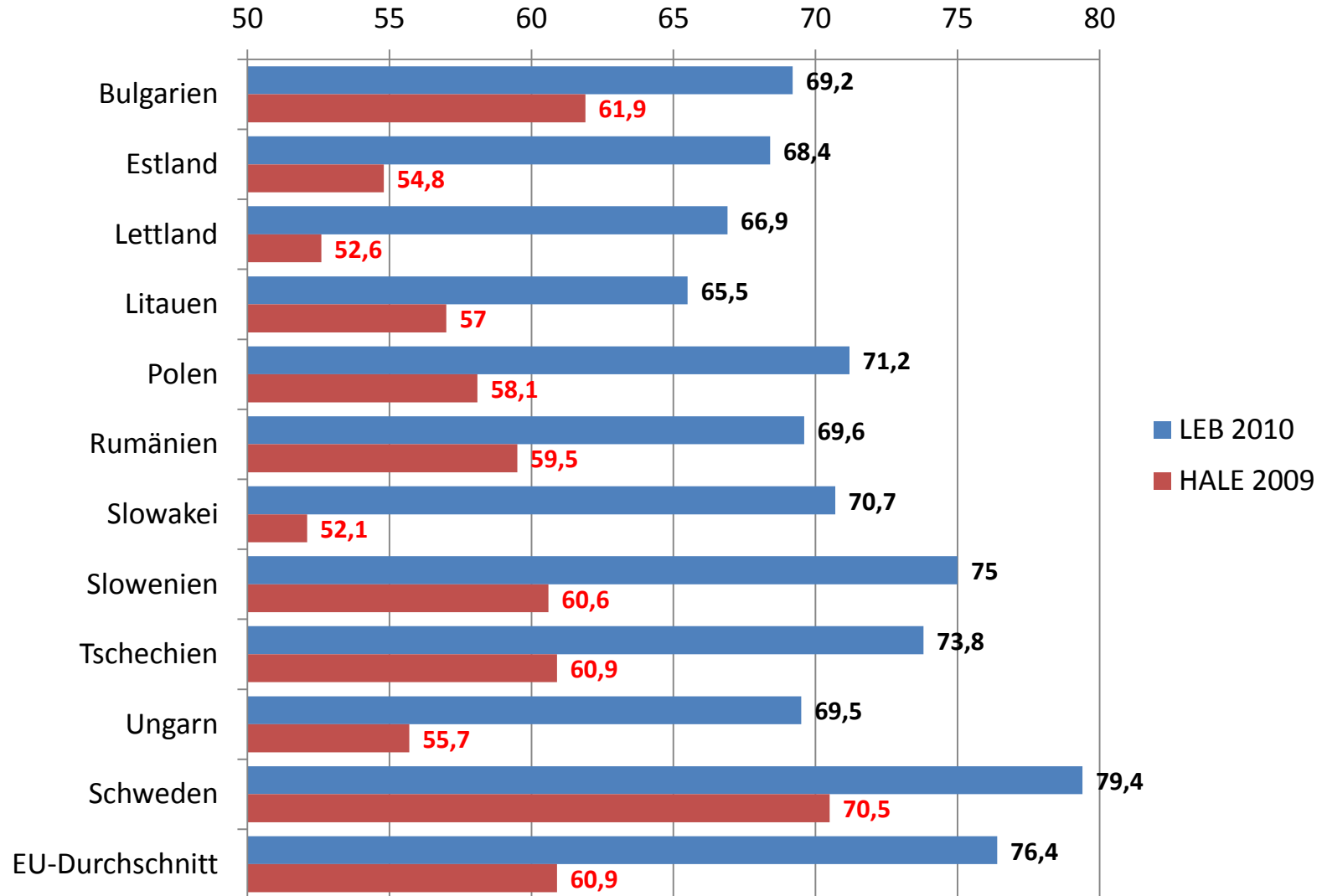
Survival from age 45-49 to 70-74 in Russia and Sweden

(Bobak, Murphy, Pikhart & Marmot 2004, British Medical Journal)



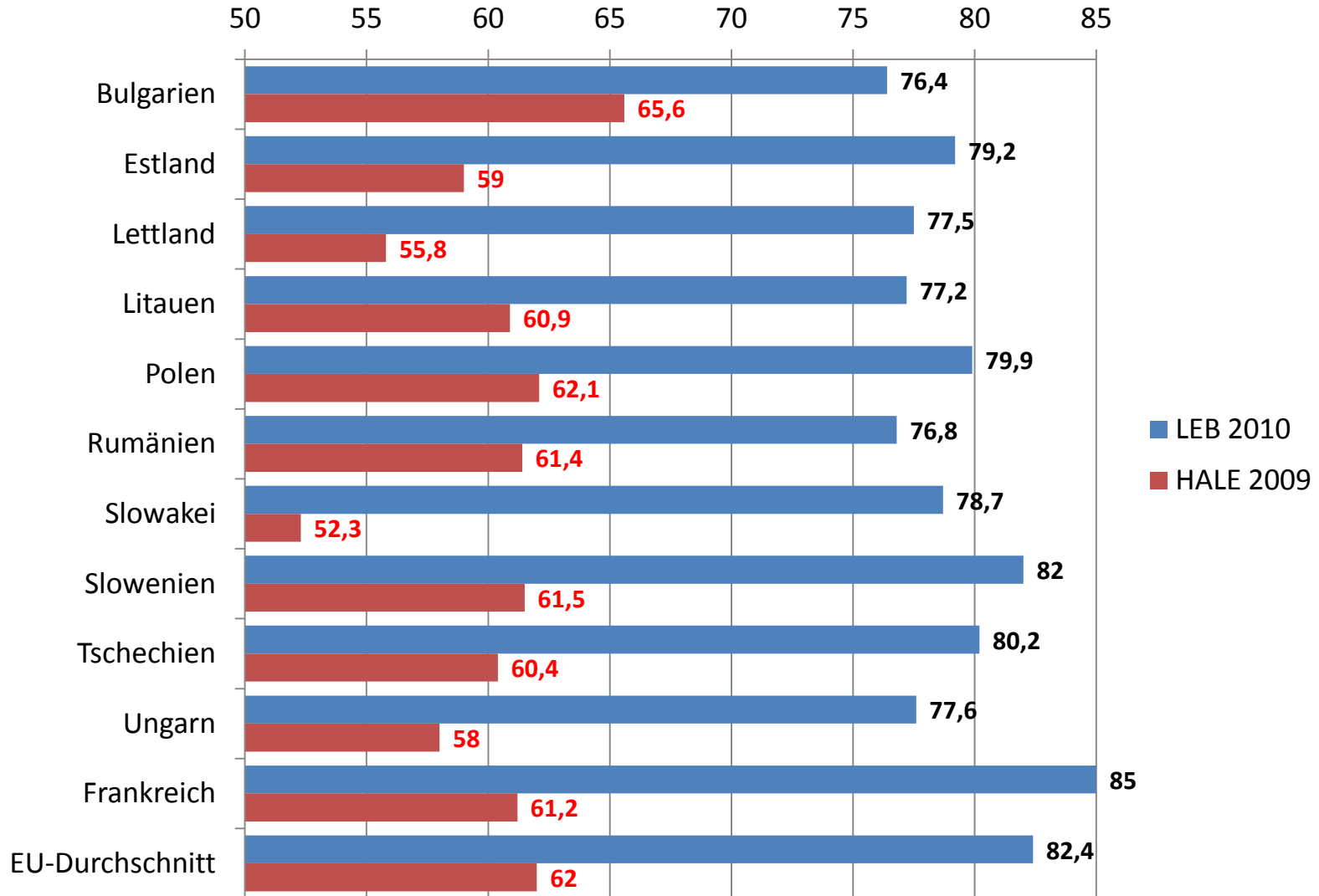


Male Life expectancy at birth and Healthy-Ageing Life Expectancy





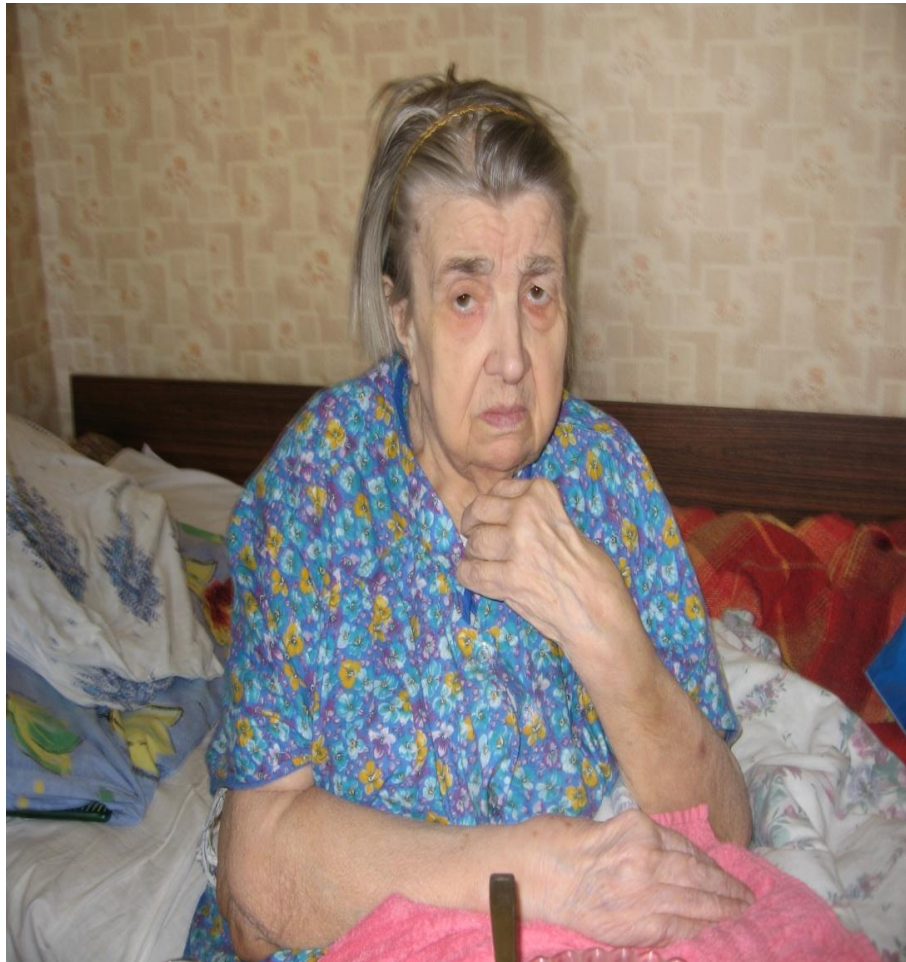
Female Life expectancy at birth and Healthy-Ageing Life Expectancy





Poverty

Growing social exclusion of Russian pensioners



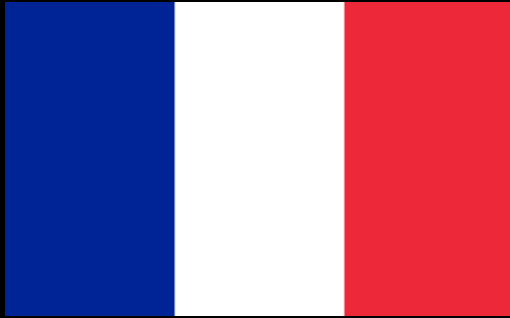
“After paying utility bills, such as the telephone or electricity and buying very basic food products, such as bread, milk, eggs, vegetable oil, carrots, potatoes, onion, porridge, and tea, there is no money left. It is simply not possible to pay for medicine, shampoo, tooth-paste, deodorants, or public transport at all. Also, there is no way to buy any clothes, books, to go to the theatre at least once in five years, use the internet, and things like that. It is also not possible to invite guests for a birthday party and it is certainly not possible to buy birthday presents for friends and relatives. An older person in Russia feels totally isolated from society.”

(Senior citizen, Moscow)



5. Key challenges for CEE societies / welfare states by 2030 and 2050

Speed of Population Ageing



It took France 115 years for doubling the share of older people (65+) from 7→14% (1865-1980)



Poland had only 47 years for doubling the share of its older population from 7→14% (1966-2013)



(and it will take China only 26 years (2000-2026) for achieving the same)

(Kinsella & Phillips, 2005)



Western Europe became
affluent before growing
old.



Central and Eastern Europe
is growing old before
becoming affluent.

Bildquellen: www.programm-altersbilder.de ;
Round (2006)

(Hoff 2011, in adaptation of Kalache 2005)

Current Challenges

- Persistence of negative stereotypes about older people
- Need to adapt institutional arrangements (e.g. redistribution of welfare)
- Ageing societies is not just about older people!
 - ⇒ need to consider intergenerational fairness throughout the process
 - ⇒ need to consider younger generations' interests (education, family formation, future pensions, labour market, etc.)
- Accept that traditional division of labour between welfare state and family does not work any longer and moral pleas will not bring it back!
 - ⇒ reality of family members living in different places
 - ⇒ families need welfare state support to continue providing care
 - ⇒ key is better reconciliation of employment and care-giving
- Urban and rural areas have different needs
 - ⇒ number of people, incl. older people, living in cities growing
 - ⇒ but share of older people in rural areas much higher – lack of infrastructure



What do ‘typical’ older people look like?





<http://www.scifit.com>

Medium-term Challenges by 2030

- Growing social inequality
 - ⇒ social cleavages between better-off and worse-off growing
 - ⇒ social differences between well-educated and less well-educated increasing
 - ⇒ long-term effects of disrupted working lives become visible in old-age, particularly for women
- Old-age poverty has always been significant across CEE since 1990s
 - ⇒ growing social inequality btw. older people with private savings and without
- More older workers
 - ⇒ those without savings cannot afford to retire and **have to** continue working in low-paid jobs
 - ⇒ those in highly-qualified positions will **be asked kindly** to continue working
- Life expectancy will continue to grow but at lesser pace
 - ⇒ continuous gains for better-off, but lesser or no gains for worse-off
- Rising numbers of childless or older people whose families live far away
 - ⇒ new forms of intergenerational contact / support outside family needed
- Growing intergenerational conflict at societal level about paying for welfare state
- Telecare / AAL / robots playing significant role in care-giving

Long-term Challenges by 2050

- CEE will have the oldest population across Europe, with more than a third of Latvian, Romanian, Polish and Slovakian population 65+
- Retirement age will have risen to 70+ or even 75+ years or abolished altogether
 - ⇒ people retire when/if they can afford to retire
- Both formal and informal care-giving delivered by robots
 - ⇒ well-designed vs. cheaply designed robots
- Older people will increasingly suffer from climate change
 - ⇒ heat waves, storms, flooding
 - ⇒ more vulnerable to changes in environment
 - ⇒ many unable to afford protective housing
- Which future will we experience?



OR





**Thank you very much
for your attention!**

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