

Nr indeksu 369209
PL ISSN 0137-4729

POLITYKA SPOŁECZNA

THE POLISH MONTHLY JOURNAL
“SOCIAL POLICY”

100 YEARS
SOCIAL POLICY IN POLAND



Ministerstwo Rodziny,
Pracy i Polityki Społecznej



NARODOWE
CENTRUM
KULTURY

No 1 ENG (14)

WARSAW 2018

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DEAR READERS,

A century of regaining independence happens once in a hundred years — not a trifling matter! Whatever one would like to say in this respect, there is no doubt that building — or rebuilding — the political foundations of Polish independence was connected with creating the foundations of institutional order in the area of social security and, more broadly, social policy. It may be worth recalling, for example, that this is also the centenary of achievements that include women's electoral rights — rights that were attained much earlier than in many other countries. In short, the effort to build political order was also accompanied by an effort to shape social order. It is good to warn readers that this issue of *Social Policy* includes a selection of texts published in *One Hundred Years of Polish Social Policy 1918–2018* [in Polish], reprinted with the consent of the publishers of that book. The editorial staff made a selection and asked the authors to make the appropriate abridgements. However, it was clear that a *Social Policy* issue containing their translations into the English language was worth publishing, including for those who, for various reasons, would not reach for a fat book of nearly 700 pages. Please bear in mind, however, that the content of this monthly cannot replace a systematic understanding into the volume on which it is based.

Editorial Staff

Introduction

In the social awareness of Poles, 2018 stands out due to the celebration of the 100th anniversary of Poland's regaining of its independence.¹ November 11th, Independence Day, was particularly festive. It was a unique moment in which Poles enjoyed the fact that they belonged to a great civic community. Polish society, like all modern societies, is characterized by considerable complexity, an element of which is functional diversity.² Thus, 2018 was an opportunity for celebration for many groups and institutions that constituted themselves within the framework of the Polish State a hundred years ago, including the Ministry of Culture and National Heritage, the Ministry of Family, Labor, and Social Policy, and the Central Statistical Office.

Each of these areas of social life is an aspect of consolidation over the 100 years of independence. Inscribing itself into the anniversary events, each one deserves special attention. Without making any claims to evaluate or compare the various pillars of social life, I would like to point out selected circumstances accompanying the birth of social policy in Poland. Their importance seems understandable when one looks at the past through the lens of great social processes.

The legislation of Poland, reborn after 123 years of the Partitions, was very modern. The granting voting rights to women, establishing an eight-hour working day, guaranteeing children free and universal education, and overseeing the working conditions juveniles, were all introduced in Poland much earlier than in many Western countries. Such regulations remained in stark contrast to the realities in which Poles had lived until then.³ Decades of exploitation of the inhabitants of Polish land and the lack of undertakings aimed at the development of the occupied territories led to a situation in which the splendor of the Polish–Lithuanian Commonwealth remained alive only in the collective memory. Additionally, society suffered from the effects of the First World War, prolonged by the fight for the eastern borders with the Soviet Union. Poverty, hunger, illiteracy, and the fate of children orphaned by civilians and soldiers who died between 1914 and 1918 were very serious challenges.

The fathers of the reborn state, headed by Józef Piłsudski, attached great importance to social issues. Before starting activities leading to the formation of the Polish army, Marshal Piłsudski was for years involved in the work of the Polish Socialist Party. Among other things, its activities involved the publishing the *Robotnik* [Worker] magazine.⁴ Industrialization and its associated urbanization resulted in such profound changes in the social structure of many countries over the course of the 19th century that, under their influence the political order of Europe began to rupture in the early 20th century. Representatives of colonial powers, future new states becoming the political organisms of many European nations formed from out of the post–Versailles behemoths, and the Bolsheviks seeking to spread the revolutionary flame across the continent⁵ played a role in establishing the new borders. Piłsudski rebuilt Poland as a national community based on culture, common history, and heritage. At the same time, he was able to effectively resist the threat from the east. This was thanks to not only his military genius, but also the trust he enjoyed due to his sensitivity to the problems of the lower social strata.

Implementation of the idea of social solidarity in the Second Polish Republic encountered serious obstacles that were the result of the economic reality as well as the objectively difficult situation involving the uniting three extremely different post–Partition realities. This is all the more reason for the merits of the fathers of the first Polish solutions in the field of social policy deserve recognition. Social issues also played a significant role in later years as raised by the opposition, especially during the birth of the Solidarity Free Trade Union, in the times of the Polish People's Republic. This sensitivity to social issues remains key even today, as exemplified by the “Family 500 Plus” program. Let us hope that, thanks to such experiences and traditions, attachment to the idea of social solidarity will also characterize future generations of Poles.

A detailed description of social policy changes in Poland over the last hundred years as well as an analysis of selected aspects of social policy can be found in the articles collected in this issue. An extensive 700–page monograph entitled *Stulecie polskiej polityki społecznej 1918–2018* [One hundred years of Polish social policy 1918–2018], edited by E. Bojanowska, M. Grewiński, M. Rymśza, and G. Uścińska, and published by the National Center for Culture and the Ministry of Labor and Social Policy (Warsaw, 2018) served as the basis for this choice. If you are interested in a more in–depth examination of the topics signaled in this issue, I encourage you to consult this informative publication, which provides additional comments and analyses of various aspects of social policy over the past 100 years.

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¹ This is confirmed by the results of a survey carried out for the National Centre of Culture by the Social Research Laboratory (PBS) on a representative sample of Poles from November 30 to December 2, 2018. The publication of the research report is planned by the Center in 2019.

² Compare with T. Parsons, *The System of Modern Societies*, Prentice Hall, Englewood Cliffs, 1971.

³ W. Roszkowski, *Historia Polski 1914–2001* [The history of Poland 1914–2001], PWN Scientific Publishers, Warsaw, 2002, p. 33.

⁴ A. Garlicki, *Józef Piłsudski. 1867–1935* [Józef Piłsudski: 1867–1935], Czytelnik, Warsaw, 1989, pp. 35–73.

⁵ N. Davies, *Europa. Rozprawa historyka z historią* [Europe: A history], translated into Polish by E. Tabakowska, ZNAK Publishing House, Cracow, 2003, pp. 981–992.

From the time when Poland regained independence until now, Polish social policy has undergone significant transformations. These changes depended on the political and economic system of the state, the condition of the national economy, and on the objectives that public authorities set for social policy at that time.

On the eve of the regaining of independence by Poland, social policy had already become one of the most important spheres of activity of public authorities. The Regency Council, the supreme state body, appointed a Minister of Social Welfare and Labor Protection on January 3, 1918. The responsibilities of this Minister were clearly defined at the same. They included issues of public charity, state care for the victims of war, worker relations, oversight for worker emigration, factory inspection, and preparing labor protection and social security legislation. The Minister took over the Temporary Labor Department of the Council of State and renamed it the Ministry of Social Welfare and Labor Protection. Over the following months and years, this Ministry underwent an organizational evolution. Among other things, it took over public health care matters that had previously belonged to the Ministry of the Internal Affairs. Apart from these and subsequent transformations, the basic tasks of the Ministry included the shaping of principles of social policy and their implementation.

One of the successes of the reborn state in the social sphere was the introduction of regulations on national social policy. They were introduced by the decrees of Józef Piłsudski: an eight-hour working day, protection of the population against the consequences of war usury, conditions for the eviction of the unemployed, creation of a state office for the return of prisoners of war, refugees, and workers as well as associations and a labor inspectorate subordinate to the Minister of Labor.

The outbreak of World War II interrupted the work of the Ministry of Social Welfare. It should be stressed, however, that in the interwar period it prepared and implemented many guidelines in the field of Polish social policy. This achievement made certain activities possible following the Second World War and subsequently in the free Poland after 1989.

Over the years 1987–1999, the Ministry of Labor and Civic Policy carried out tasks related to employment, benefits, and social security. After the introduction of government administration departments, it was replaced by the Ministry of Labor and Social Policy. This office was served by the minister in charge of the labor and social security departments. The office was later merged with the Ministry of Economy. After some time, the Ministry of Economy, Labor, and Social Policy was divided into the Ministry of Economy and Labor and the Ministry of Social Policy. It was only the previous government of the Law and Justice Party that restored the Ministry of Labor and Social Policy.

In 2015, the Law and Justice government changed the name of the Ministry. Pursuant to the Directive of the Council of Ministers of December 3, 2015, it was renamed the Ministry of Family, Labor, and Social Policy. This designation fully reflects the scope of tasks of the ministry. At the same time, it reaffirms the fact that shaping conditions for family development is a priority for the government.

The Law and Justice government places strong emphasis on family welfare, which is in performance of the provision found in Article 71(1) of the Constitution of the Republic of Poland, which states that:

In its social and economic policy, the state takes into account the welfare of the family. Families facing difficult material and social situations, especially families with many children and single-parent families, have the right to special assistance from public authorities.

This provision corresponds to the principle behind the economic system as expressed in Article 20 of the Constitution that, subject to Polish conditions, is based on a social market economy — i.e. based on freedom of economic activity, private property and solidarity, dialogue and cooperation of social partners. Although this is a programmatic norm, the concept of social market economy appears to be blurred, despite many attempts to define it. The social market economy is considered a third way. On the one hand it is different from the liberal concept of a free market, while on the other from a planned economy characteristic of totalitarian regimes.

It is impossible not to agree with the opinion expressed on the following pages of this publication that it is difficult to predict the direction in which social policy will evolve over the next few or few dozen years. This will depend on many variables. There is no doubt, however, that it should constantly respond to the needs of a changing world.

Today, specific challenges encompass trends involving demography, globalization, automation of production processes, investment in human capital, and the knowledge-based economy. This necessitates the application of new, previously unknown instruments, both in social policy and in economic policy, which are, after all, a system of interconnected vessels. This monograph provides a reliable diagnosis as well as many interesting predictions and guidelines. Its editors and the authors of individual chapters present numerous, often very complex, issues in areas of interest to social policy with great expertise and in a very accessible way.

One Hundred Years of Polish Social Policy [in Polish] is an extremely valuable book in terms of its selection of comprehensive topics — the work of eminent experts in the field. It will inspire and contribute to further research on social policies. This publication is an expression of appreciation for those who have contributed to the development of social policy theory and practice.

The content of the book, to which I have the honor and pleasure of adding a few words of introduction, should be read by all those who have an impact on the shaping of social and economic policy in Poland. It will surely also prove interesting reading for scientists and social policy practitioners as well as students of the social sciences, including political science, social policy, the family sciences, and sociology. I would like to express my appreciation to the editors and co-authors for producing this publication.

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SOCIAL POLICY DURING POLAND'S MEMBERSHIP IN THE EUROPEAN UNION 2004–2017*

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INTRODUCTION

In their attempt to describe the social policy implemented in Poland over the years 2004–2017, the authors of this text were completely aware of the complexity and multiple threads inherent in the analyzed subject. Moreover, the implementation of this task turned out to be extremely difficult. On one hand, the diversity of ideological orientations concerning the social policy of the Polish state, of six prime ministers and their political background, and the organizational efficiency of the seven governments they headed, had to be tackled. On the other, the analysis looked at the reception of the severity of Poland's social problems by various groups of Polish society as well as the expectations of those groups with respect to the power elites and their strategies for the social and economic development of the country. The third dimension of this study focused on the effect of Poland's accession to the European Union — potential and real opportunities for modernizing the country, including in the context of social policy areas neglected in the 1990s. This area of change, whose assessment over the different intervals of the discussed period balanced between the euphoric and an actual assessment of Poland's development potential following accession to the EU, was primarily related to the enormous organizational effort of public and self-government administration in the face of the need to meet the formal requirements of EU institutions. This involved the implementation of Community legislation, harmonization and coordination of internal reforms in the social area with EU strategies, and finally the identification of application of financial rules for obtaining and using funds from the European Social Fund, the Cohesion Fund, and the European Regional Development Fund.

Therefore, we have selected what we consider the most important issues and indicated the basic tendencies and characteristic features of the analytical areas mentioned above.

SELECTED INDICATORS OF SOCIAL DEVELOPMENT IN POLAND AFTER 2004

Statistical indicators provide information on the scale and characteristics of social problems, set the objective and directions of social policy actions as well as their dynamics and trends, and indicate the relationship between social (and economic) policy instruments and the growing or decreasing social problems in the life of individuals and social groups.

While during the period in question Polish legislation was changing fundamentally and new public institutions were created, there was a visible improvement in Poland's road infrastructure, progress in the creation of social infrastructure, access to employment, improvement in the quality of employment and the level of social benefits, and a reduction of the risk of poverty and social exclusion,

* Abbreviated and translated version of the text entitled "Polityka społeczna w okresie członkostwa Polski w Unii Europejskiej 2004–2017" included in the publication "Stulecie polskiej polityki społecznej 1918–2018" ["One hundred years of Polish social policy 1918–2018"], published by the Ministry of Family, Labor and Social Policy and the National Centre for Culture, Warsaw 2018. Reprinting with the consent of publishers and authors.

which became much less noticeable to Polish society. The most meaningful assessment of chances for the improvement of living conditions and individual development prospects in the country are reflected in the waves of mass economic emigration.

However, if one follows the changes in the Human Development Index (HDI) for Poland (estimated by the UN Development Program, *United Nations Development Program*, UNDP),¹ it may be concluded that all the components of the indicators increased systematically, improving the absolute value of the HDI for Poland.

Table 1. *Human Development Index (HDI) for Poland over the 2005–2015 period according to UNDP data*

	2005	2010	2011	2012	2013	2014	2015
HDI indicator	0.803	0.829	0.834	0.838	0.850	0.852	0.855

Source: "Briefing Note for Countries on the 2016 Human Development Report, Report Poland," Human Development Report UNDP, 2016.

However, Poland's position in the ranking of 187 countries that were analyzed did not change significantly. Poland moved by only one place — from 36th position in 2004 to 35th position in 2015. It can be said that, in comparison with other countries, the progress measured by social development indicators in Poland over the 2005–2015 decade was insignificant. However, two undeniable facts should be taken into account. Firstly, Poland was one of the countries whose national income per capita ranking would have placed it much lower. Secondly, accession to and integration with the EU radically reduced the percentage of people living below the minimum subsistence level by increasing the economic and investment potential of many regions, including through EU development funds, opening up labor markets to Poles (in several countries after a transition periods), and securing farmers' income through Community agricultural policy.

The next area of analysis shows the dynamics of changes in Central Statistical Office (GUS) statistical indicators concerning employment and unemployment, the scope of extreme and relative poverty, and the dynamics of changes in the level of social spending in GDP. The first two areas fall within the set of indicators adopted by the European Council in Laeken in 2001 and concern those social problems that most measurably imply the living conditions of the individual, the family, and the household, while placing them in the classical subject of state social policy. The third indicator reflects the direction of changes in the share of social spending in gross national income in economically favorable years and steady growth of national income.

The employment rate increased by 8.5 percentage points over the whole period. However, this increase was not fully satisfactory. Nearly half of Poles remain professionally inactive or work on the gray market.² The question of the potential impact of the "Family 500 plus" program on the actual deactivation of women in the labor market and the possibility of slowing down the increase in the employment rate, which is noticeable in the 2014–2016 period, remains open to the present day.³

The nature of the changes in unemployment was unequivocal. Its rate fell between 2004 and 2008, after which it increased between 2009 and 2012. This was despite the still favorable economic situation in Poland, which was not severely affected by the global

economic crisis after 2008. (Poland was portrayed by the European Commission as well as by the Polish government as the green island of Europe in the context of the global crisis).

The next four years marked a return to the downward trend in unemployment rate in Poland, with a particularly rapid decline taking place in 2015–2016. The long-term unemployment rate should still be considered as high, however. After a positive trend in 2004–2010, the share of the long-term unemployed in the total number of the unemployed in subsequent years until 2014 saw an increase up to the level of almost 3/5 of their share and a reversal of the trend. Over the 2015–2016 period the share of the long-term unemployed dropped to 2/5 of the total number of this population.

The general assessment of the direction of changes in the scale of poverty risk in Poland in the discussed period is positive. The share of households experiencing relative and extreme poverty has decreased. However, these changes have varied over time, reflecting the degree of commitment of successive governments to a policy of combating poverty and social exclusion in Poland. The extent of relative and extreme poverty decreased between 2004 and 2007. In the years 2008–2014 there was a significant increase in the extent of extreme poverty and the dynamics of a decrease in the share of households living at the level of relative poverty weakened. This unfavorable trend was halted in 2015. Since then, what can be seen is a significant reduction in the risk of poverty as measured by both measures. According to the Central Statistical Office (GUS), the factors that contributed the most to the decrease in extreme and relative poverty in 2016 were an increase in wages, a decrease in unemployment, and the introduction of the “Family 500 plus” program as of April 1, 2016.

The groups particularly exposed to extreme poverty in 2016 were households living on unearned sources of income, the households of retirees and farmers, families with many children, children up to seventeen years of age, households with a head of the household with lower secondary education or less, and households with disabled persons (*Zasięg ubóstwa...* [The range of poverty...] 2017: 6). Despite the fact that in the years 2005–2016 the scale of poverty decreased, every seventh statistical Pole continues to struggle with very difficult living conditions (over 5 million people), and every twentieth resident of Poland (over 1.8 million people) lives in conditions that make it impossible to satisfy basic existential needs (*Expenditure...*, 2017).

The above analysis clearly shows that after 2008 — despite the increase in national income — the dynamics of the improvement in the situation on the labor market and the reduction in the risk of poverty observed in the years 2004–2007 weakened. This was the result of several conscious decisions taken by the Polish government, including freezing the income thresholds for family benefits and social welfare benefits, maintaining the statutory poverty threshold below the subsistence minimum, further deregulation of the

labor market as part of what was known as the anti-crisis package (involving, *inter alia*, working time, overtime, and fixed-term contracts). It was a period of particularly severe regression in the social policy of the state, a limiting of public finances, primarily in the area of expenditure for the poorest, with the simultaneous development of normative and financial instruments strengthening the protection of unrestricted economic freedom.

ECONOMIC EMIGRATION OF POLES: LOSS OF POPULATION AND EMPLOYEE CAPITAL

In the years 2004–2014, the attitude of successive governments of the Third Polish Republic was extremely favorable to economic emigration. The political discourse was dominated by the promotion of economic emigration as an opportunity for employment guaranteeing higher incomes than in Poland, opportunities to increase consumption in families and households (also due to income transfer), an antidote to unemployment, and even as a kind of compensation for the exclusion of Polish workers from Western labor markets in the period preceding Poland’s accession to the European Union (Firlit-Fesnak, 2013: 22).

The principle of free movement of workers as a primary value of the EU was treated as a historical opportunity for Poles. The opening of labor markets was accepted as a boon without noticing the negative social and economic consequences for the country. The document adopted in 2012 by the Council of Ministers — “Migration Policy of Poland: The Current State of Affairs and Proposed Actions” [in Polish] — was in fact a strategy for Poland’s migration policy without any policy on economic emigration. It showed a far-reaching asymmetry between the low interest of the power elites in emigration processes and high support for a policy enabling the inflow of economic immigrants to Poland. The only area of “recommendations” related to emigration concerned the secondary aspect of this process — i.e. return migration. However, here too there were no significant proposals for potential decisions on emigration solutions in the field of labor market regulation, social security reform, investment stimulation, and economic activity of re-emigrants in their home country (Firlit-Fesnak, 2013: 29; *Social effects...*, 2014: 52–57). It was not until 2015 that a change in the political narrative regarding the economic emigration of Poles and its unfavorable consequences for Poland took place.

The scale of economic emigration of Poles in the post EU accession period is comparable to the scale of such emigration in the interwar period. In total, more than two million people left Poland in the years 1918–1938 and more than one million people returned from emigration. The balance of migration flows of Poles in the interwar period was negative — it amounted to over one million Poles who remained outside the country permanently (Janowska, 1989: 155). According to GUS data covering the years 2004–2016, the number of Polish emigrants temporarily staying abroad⁴ increased

Table 2. *Employment, unemployment, poverty rate, and social transfers in the years 2004–2016 in Poland — selected indicators (in %)*

	2004	2006	2008	2010	2012	2014	2015	2016
Employment and unemployment (LFS)								
1. Employment rate	44.3	46.5	50.4	50.0	50.2	51.2	51.9	52.8
2. Unemployment rate	19.8	14.4	7.2	9.8	10.0	8.7	7.2	5.9
3. Long-term unemployment rate (over twelve months)	52.2	49.3	34.0	29.0	35.4	58.1	39.7	40.7
Poverty rate (% of persons in the household)								
1. Extreme poverty line	11.8	7.8	5.6	5.8	6.8	7.4	6.5	4.9
2. Relative poverty line	20.3	17.7	17.6	17.4	16.3	16.2	15.5	13.9
Share of social expenditure (% of GDP) and GDP growth (%)								
Social expenditure in GDP	20.3	19.7	19.3	18.9	18.8	19.1	20.6	20.4
Average annual GDP growth rate	5.3	6.2	5.1	3.8	1.6	3.3	3.6	3.4

Source: “Range of Economic Poverty in Poland in 2016,” GUS, June 2017, <https://stat.gov.pl> (December 2, 2017); “Poverty in Poland in Light of GUS Research,” GUS, Warsaw, 2013; “Economic Activity of the People of Poland,” GUS, Warsaw, 2017; “Unemployed Remaining Unemployed for More than Twelve Months from the Moment of Registration,” Ministry of Labor and Social Policy, Warsaw, 2009; “Verified Estimate of Gross Domestic Product for 2010–2014,” GUS, Warsaw, 2015; “Information on the Social and Economic Situation in Poland,” GUS, Warsaw, 2016; “Social Protection in 2014,” Eurostat, 2016, “Social Protection Statistics,” June, 2017, ec.europa.eu (December 2, 2017).

from one million in 2004 to more than 2.5 million in 2016. More than 31% of these emigrants chose the United Kingdom as their destination country and 27% selected Germany (*Informacja...* [Information...], 2017). It is estimated that about 80% of temporary emigrants from Poland stay abroad for at least twelve months (referred to as long-term emigrants). On the basis of the 2017 study on the migration plans of Poles, it can be concluded that the forecasts are not favorable. Although in comparison to 2015 the percentage of respondents planning economic emigration decreased by over five percentage points (from 19.1 to 13.7%), the population of potential emigrants constitutes almost 9% of the population of Poland and it mainly consists of young people aged 18–34. It should be added that the majority of potential emigrants are working people (59%) earning the minimum wage.⁵ Continuously low incomes — a key feature of the lack of decent work in Poland — are the main motive for economic emigration.

In the opinion of the authors, the following aspects of the Polish labor market had a key impact on the economic emigration of Poles: a higher share of fixed-term work in this market, the low level of wages, growth in the number of poor workers, ongoing deregulation of the labor market restricting employee rights, the lack of an effective system of employment control in the gray market, poorly recognized discrimination against employees in the Polish labor market, the low efficiency of labor market institutions, especially in the field of school advisory services and job placement for graduates of schools and universities, and information flow on regional vacant jobs. These phenomena have been compounded by the high volatility of unemployment policies on the part of the public authorities and the lack of coherence between economic and social policies supporting job creation.

Another important factor encouraging emigration is related to the low level of social protection⁶ in Poland in the case of social risks such as unemployment, old age, illness, disability, family disorganization, and lack of means of subsistence. It is also impossible not to point out the negative effects of the reduced role of the state as a direct provider of social services coupled with its significantly reduced regulatory and financial role. Mass emigration of Poles brought measurable losses for the state and society. The words of Ludwik Krzywicki (1892), a precursor of research on the migration of Polish population 125 years ago, did not lose their relevance: “Alas, the tide of emigration, while opening the hope of a better tomorrow to one, harms the social interest of the whole and the broader it is, the more it is harmful.”

THE IMPACT OF EU LEGISLATION, DEVELOPMENT STRATEGY, AND EU FUNDS ON REGULATORY AND DECISION-MAKING PROCESSES IN POLISH SOCIAL POLICY

Poland’s accession to the European Union means the country is included in the freedoms of the single market, Community legal regulations as well as the system of development support in the form of structural and cohesion funds and the common agricultural policy. Undoubtedly, Poland benefited from its accession to the EU. The scale of development programs and opportunities that emerged after 2004 was incomparably greater than when Poland was a candidate for accession to the Community (Grewiński and Głabczka, 2006: 77 et seq.). Although not all countries immediately agreed to apply the freedom of movement of workers with respect to Poland, applying different transitional periods, after a few years all borders of EU countries were open to Poles.

Like all Member States, Poland was obliged to adapt Polish law to the *acquis communautaire*. This process began at the end of the 1990s. Nevertheless, it was only in 2004 that it became important in light of the introduction to the normative order in Poland of primary and secondary European Union legislation, including the coordination of social security systems and the open coordination method (Boruta, 2002: 10 et seq.) for employment, social integration, health, and education policies.

Coordination of social security systems has ensured social security for Poles working in EU countries and equal rights of access to social security systems in the countries of employment with other EU citizens (Uścińska, 2011: 97 et seq.). The open method of coordination — through the implementation of common objectives, guidelines, endorsements, and recommendations — created common areas of implementation of specific policies and the implementation of certain solutions and instruments of action through common strategies, programs and action plans (Dziewiecka–Bokun, 2017: 30). Thanks to integration with the EU, Poland has also benefited from the experience and achievements of the EU in the field of social dialogue, health and safety standards, working conditions, and the implementation of gender equality policy (Firli–Fesnak, 2005).

Immediately after its accession to the EU, Poland benefited from the structural funds and, to this day, remains a beneficiary of the EU aid policy. In the context of implementation and execution of the concept of active (stimulating) social policy, the European Social Fund was most important over the last dozen or so years. It mainly financed those measures for which the National Labor Fund lacked funding — i.e. active labor market policy and social integration policy. Poland was allocated more than 25 billion euro over the 2005–2020 period under programs financed by the European Social Fund. Of this money, 11 billion euro was for the years 2007–2013 and 13.2 billion euro is earmarked for the 2014–2020 period. Given that these resources are exclusively designated for investment in social policy, it is important to emphasize both their size and their allocation to active labor market policies, active inclusion, the development of the social economy and social services, as well as social innovation.

An unquestionable benefit of the intervention of the European Social Fund has been the financing over the last few years of thousands of small, grassroots projects implemented by local public, nongovernmental, and private entities that have made a real contribution to improving the social and professional situation of many social groups (Grewiński, 2009). Monies from this Fund were less well spent on what are known as systemic projects, which were supposed to contribute to changes in the implementation of public policies, in particular social policy. Many projects were ill-considered and unprofessionally implemented, while some of the good project results were not included in the mainstream of the given policy.

DEVELOPMENT OF FAMILY AND SENIOR CITIZEN POLICIES AND THE LACK OF REFORM IN SOCIAL ASSISTANCE

Family policy was more or less present in the electoral programs of most major political parties as well as in the activity of all governments. The need for clear support for the family as well as conditions for the creation and development of such support was discussed in exposés by successive prime ministers — Jarosław Kaczyński (2005), Donald Tusk (2007 and 2011), and Beata Szydło (2015). The amount of family financial benefits, their types, and conditions for obtaining the right to them, were decidedly variable over the discussed period.

The one-off cash payment for childbirth, introduced in 2005, has become a permanent solution.⁷ The history of family tax relief for each child introduced in 2007 is different. Its amount was reduced in 2009. Starting with 2013 it became selective (the right to tax relief became dependent on the family’s income) — i.e. it provided relief for the poorest families. The climate around maternity and parental leave has been consistently favorable since 2006. The combined duration of maternity and parental leave — paid at 80% of the previous salary — is now one year. This places Poland among countries with the most advantageous system for supporting families with young children. In 2010, a two-week paternity leave was introduced for use in the first year of a child’s life. Also worth mentioning is the “pro-family” initiative of Bronisław Komo-

rowski, President of the Republic of Poland — the “Good Climate for the Family” program.

The “Toddler” program was initiated in 2010 as a part of the activities of the Ministry of Labour and Social Policy. Its aim was the organizing of nursery schools in small towns and boroughs by local government, partly from budgetary resources. An important step in improving access to childcare for children less than three years of age was the adoption of what is known as the nursery school law.⁸ It introduced new forms of care for the youngest children: children’s clubs and day-carers who care for several children at home. This solution was particularly important for residents of small towns with fewer nurseries and where it was more difficult to organize childcare. In 2011, the issue of foster care and family support in crisis situations was also regulated normatively.⁹ In 2014, a government program of assistance for families with many children, the “Big Family Card”, was implemented.¹⁰ It is a system of discounts and rebates (when buying or using services) in public institutions and private companies for families with at least three children.

In 2016–2017, the Law and Justice government launched the “Family 500 plus” program. The benefit from this program is granted for each second and subsequent child, as well as for a single child when the income criterion is met — i.e. no more than PLN 800 per person in the family.¹¹

It should be stressed that the “Family 500 plus” is a social program that is part of a long-term social investment strategy, but apart from the social context it has extremely important economic, political, and cultural consequences. From the social point of view, “Family 500 plus” is an important system of financial support for the family, perceived as an investment in the development of Polish families, a reduction in the risk of poverty, equal development opportunities for children, and indirectly an effort fostering an increase in fertility in Poland. This is the first serious program for economic family support in Poland in twenty-five years. It can be rated positively from the point of view of the values and priorities of social policy (Bojanowska, 2017: 243–260).

Economic discourse draws attention to the very high costs of implementing the “Family 500 plus” program, its high burden on public finances, and its negative consequences for the labor market due to the deactivation of a portion of women who give up work due to benefits. The potential long-term impact of career breaks on women’s retirement pensions is also to be expected. The political consequences of the program can be seen above all in the change in the attitude of the opposition towards this instrument, from critical and disowning at the launch of the program to the current (in view of its success) positive assessment and plans for its further improvement. The “Family 500 plus” program has certainly introduced the issue of social policy into the arena of political discourse, which is an important added value in the context of a lack of discussion on the subject. The cultural consequences of the program are the most difficult to assess at this time. They require a much longer period and perspective (Kamiński, 2016: 141–143).

An active senior citizen policy was present in the second half of the analyzed period. It is worth recalling that during the first two decades following the political transformation in 1989 little was done in this respect (Kubiak, 2016; Trafialek, 2016; Woźniak, 2016). The very concept of a senior citizen policy was first introduced in the name of the newly established Senior Citizen Policy Department of the Ministry of Labour and Social Policy in 2012 and subsequently in the name of the Senior Citizen Policy Council of the Ministry of Labour and Social Policy, a consultative and advisory body. The tenets of a long-term senior citizen policy in Poland for the years 2014–2020 were adopted in December 2013. The document sets out the main priorities for the implementation of senior citizen policy in the following areas: health care, long-term care, labor market policy, lifelong learning, public safety, promotion of culture, support for social activity, and the creation of a “silver economy.”

The growing importance of senior citizen policy in recent years is also evidenced by the fact that in September 2015 the Act on Senior Citizens was passed. It regulates the way and scope of monitoring and presenting information on the situation of older people, lists entities participating in this task, and indicates the sources of its financing (Szatur–Jaworska, 2017: 93–96). It is worth noting that political discourse in Poland around senior citizen policies has coincided with the celebrations in 2012 of the European Year for Active Ageing and Solidarity among Generations.

Several special programs were set up after this period, including the “Government Program for the Social Activity of the Elderly – ASOS,” the “Generational Solidarity Program: Measures to Increase Labor Force Participation of People Aged 50 Plus,” and “Senior Citizenship – Vigor”. A new initiative in 2016 was the “Medicine 75 plus” program, which enabled senior citizens over 75 to obtain certain medication free of charge (Ibid., 101–108). In the last two years, the government has allocated additional resources to the “Senior Plus” program by which local authorities can receive financial support for the creation of daytime activity clubs and centers for the elderly. In 2018, PLN 80 million in funds was earmarked for the implementation of this program.

In 2017 Ministry for Family, Labour, and Social Policy introduced a new “Care 75 plus” program. Its aim is to increase the availability of care and specialist services for solitary and elderly people aged 75 and more living in small boroughs (up to 20,000 inhabitants). Over PLN 57 million was put aside for the implementation of this program. The facts presented above indicate that starting with 2012 it is indeed possible to speak of the emergence of the seeds of a systemic senior citizen policy. It is undoubtedly a positive example of the development of social policy addressed at the elderly, responding to the ageing of Polish society and new challenges in this area.¹²

A weakness of the social policy implemented in the years 2004–2017 in Poland was the lack of reforms in the social assistance system with respect to the development of social services. With the exception of the introduction of the new profession of family assistant, which undoubtedly filled a gap in social work with families in local communities, and supervision as a tool to support social workers, there has been no in-depth reorganization of the system in this respect. Most probably these changes will be proposed in 2019 by Ministry of Family, Labor, and Social Policy that, in cooperation with the Chancellery of the President of the Republic of Poland, is preparing guidelines for the introduction of social service centers (Grewiński, 2017).

SUMMARY

The issues raised in this chapter justify the formulation of general conclusions concerning aspects of Polish social policy characteristic of the discussed period of development, elements of its adjustment to adapt to the EU *acquis communautaire*, modernization in some of its areas under the influence of EU institutions and the experience of Western European countries, and areas of good development, but also the abandonment or inactivity of the state in many specific policy areas as well as the root of the most severe consequences for society — the imbalance between economic policy and social policy.

One of the significant elements influencing the effectiveness of the system of social policy implemented in Poland over the discussed period was the continuation of unproductive political disputes between different axiological orientations on the issue of perception of the social function of the state, and the scope and instruments of social policy. There was also no attempt to define a constitutional provision on the social model of the market economy (Article 20 of the Constitution). The political discourse was dominated by formal issues — deadlines, audits, settlements, assessments of the European Commission — and there was no substantive message regarding the essence of changes and assessments of their consequen-

ces in the lives of the average citizens and the average Polish family. Flagship areas of transformation in social policy in the context of the EU strategy concerned areas of social policy that are crucial for the social security of Poles: employment policy and counteracting unemployment, social assistance, and social insurance.

It seems that the years 2008–2014 were the most difficult for the Polish society. The period was one of increased concentration on free market economic policy, with the gradual elimination of elements of social policy based on solidarity. However, in his October 2007 statement, Prime Minister Donald Tusk declared that “a just state always takes care of the weakest.”¹³ Despite good economic indicators, unemployment and the risk of poverty increased again, the protection of workers’ rights weakened, and the area of precarious work expanded. Measures to discipline public finances reduced the real value of social benefits and access to public social services, undermining the sustainability and value of the already relatively low social guarantees. The outcome of the 2015 elections and the formation of a government by the Law and Justice party gave hope for a change in the priorities of economic and social policy. Such a message was found in the expose of Prime Minister Beata Szydło.¹⁴ The new government has put a strong emphasis on family and senior citizen policy.

The years 2004–2017 certainly involved the modernization of several detailed areas of social policy under the influence of the implementation of EU legislation, especially concerning instruments of professional activation, development of the social economy, social integration, counteracting marginalization and social exclusion, lifelong education, and the non-discrimination of social groups from areas at risk of unequal treatment. This period was also a time of boosting the development of local social policy and its institutions in terms of diagnosing social problems, identification of their regional conditions, and building a broad partnership for cooperation among government and local government administration, economic entities, and public organizations.

¹ The social development indicator includes average indicators relating to health care (the life expectancy indicator), education (the literacy and enrolment indicator), and income sphere (assessed on the basis of GDP per capita according to purchasing power parity). The Human Development Index (HDI) is complemented by three synthetic measures: the Gender Related Development Index (GDI), the Gender Empowerment Measure (GEM) and the Human Poverty Index (HPI).

² The Central Statistical Office (GUS) estimated that in 2014 approximately 711,000 employees worked in the gray market in Poland, compared to 1.3 million in 2004. This means that in the years 2004–2014 the share of those working in the shadow economy decreased by a factor of two in relation to the total number of people working: from 9.6% in 2004 to 4.5% in 2014, see *Praca nierejestrowana...* [Undeclared work...], 2015.

³ Monitoring women’s exiting from the labor market after the introduction of the “Family 500 plus” program as carried out by the Ministry of Family, Labour, and Social Policy indicates that about 50,000 women resigned from work as a result of obtaining this benefit.

⁴ These are persons staying abroad for more than three months. Among them there are also people who often stay abroad for many years, but have not de-registered from their permanent residence in Poland in connection with a permanent stay abroad. Estimates do not include the seasonal emigration of Poles.

⁵ Economic Migrations of Poles,” Millward Brown Institute, 2017.

⁶ A high level of social protection is one of the pillars of the European social model. One of the few definitions of the European social model is based on four main pillars: an efficient economy, a high level of social protection, education, and social dialogue (European Council, Barcelona, 2002).

⁷ Act of December 29, 2005 on Family Benefits (Journal of Laws of 2006, No. 12, item 67).

⁸ Act of February 4, 2011 on the Care of Children up to Three Years of Age (Journal of Laws No. 45, item 235).

⁹ Act of June 9, 2011 on Family Support and Foster Care (Journal of Laws No. 149, item 887).

¹⁰ Act of December 5, 2014 on the “Big Family Card” (Journal of Laws, item 1863).

¹¹ Act of February 11, 2016 on State Aid in Bringing Up Children (Journal of Laws, item 1851).

¹² Based on information available at www.mrpips.gov.pl (November 28, 2017).

¹³ Expose of Prime Minister Donald Tusk of October 10, 2007, www.rp.pl/artyku/71439-text-expose-premiera (December 3, 2017).

¹⁴ Exposé of Prime Minister Beata Szydło of November 18, 2015, stenographic record, <https://www.premier.gov.pl> (January 11, 2017).

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ABSTRACT

The publication is an analysis of the selected aspects of Polish social policy in 2004–2017, its endogenous and exogenous determinants, the results of political decisions on the state of development of key areas of social policy and their impact on access to social rights of Polish society. The subject of studies are such issues as the image of social development in Poland in the context of selected indicators, development of family and senior policy, the impact of Poland's accession to the European Union on the direction and scope of employment policy changes, labour market, social security, and efficiency of public administration, a dependence between the Polish social policy and economic emigration of Poles.

Key words: economic emigration, EU influence on Polish social policy, family and senior policy, social policy, social security, social services, risk of poverty

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The Institute of Labor and Social Studies – ILSS (Instytut Pracy i Spraw Socjalnych) based in Warsaw, Poland, is a scientific research institute. The Institute has been operating for forty years serving not only government administration and policy makers, but also taking active part in academic research works, tutoring and supervising series of publications, especially those valuable in the teaching process. The Institute's basic research works are accompanied by applied studies, and the requirements of current and strategic social and economic policies. The main forms of activities are: Research activities as: statutory research, State Committee for Scientific Research grants, international projects, seminars, conferences.

International co-operation as: international research projects, bilateral research projects, data base development; Expert reports and consulting as: assignments commissioned by various institutions, activities of public services; Education as: post-graduate studies, phd studies. The research activities of the Institute cover the labor and social policy questions in an interdisciplinary manner. The research directions are adjusted to the current needs of the national socio-economic policy, and comprise such areas as economy, law, political sciences, sociology, pedagogic sciences. The research covers the topics crucial to currently pursued socio-economic policy and directions of change processes, such as:

- Labor problems (labor market policy, migration for work, human resources management, working time, remuneration and motivation systems, occupational science, labor law).
- Collective labor relations (social partners, collective disputes, employee participation, collective bargaining, collective agreements, collective labor law).
- Social policy (state social policy, social security, social institutions and instruments, family problems and family policy, poverty, social exclusion and counteracting measures).

Institute research findings are used by the central and local government administration as well as by business entities. The publishing house of the Institute prepares numerous publications (for Polish and international markets) that are useful in the teaching process. The seminars and conferences organized by ILSS are forums for exchanging experiences, ideas, expertise and knowledge on a national and international level. The researchers employed in the Institute are recognized scientists, both in Poland and abroad. Their expertise and experience encourages foreign partners to undertake international research projects with ILSS. As a leader of labour and social studies in Poland, ILSS took part in numerous EU funded research activities under 6th & 7th FP, PHARE, Leonardo da Vinci, etc.

The Institute has actively participated in the processes of accession and integration of Poland into the European Union. In the wake of the accession the research activities focused on:

- Problems of adaptation of Polish law to European legal regulations,
- Influence of EU integration on labor market situation and trends,
- Labor market and social policy and the challenges of integration,
- European and Polish standards of social security,
- Social exclusion and reintegration.

Poland's accession into the European Union on 1st of May 2004 does not mark the end of the ILSS activities and struggles in these research areas. On the contrary, we expect new problems to appear and to be identified and dealt with. If you have any questions regarding activities or research of ILSS, please feel free to contact us. We are eager to undertake any form of international cooperation with institutions and individuals.

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Publisher: Institute of Labor and Social Studies, 01-022 Warszawa, J. Bellottiego street 3B

Published and Financed by the Owner of the Title

Printed and bounded by: Publishing House MFLSP. Ordering 652/2018. Number of Copies: 150.