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*Fulfilled promise or a tool of political rhetoric?
Analysis of the consequences
of the Polish “500+ Family” Programme*

Abstract

The article is a critical analysis of the “500+ Family” Programme, a new instrument of demographic and family policy in Poland. The article seeks to answer the question: what are the effects of the Program implementation from the perspective of various structural categories and social actors which we can find in the Polish scientific and journalistic discourse? The “500+ Family” Programme, officially aimed to encourage people to

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have the second and more children, improving the educational potential of families and increasing the scope of economic security in families with children, is actually an instrument of social policy with a wide spectrum of both positive and negative influences in the areas of income, labour market, mental health, citizens' financial situation, their subjectivity and women's empowerment. The study offers a presentation and organisation of all effects of changes induced by the "500+ Family" Program which currently exist in the public debate in Poland. The authors of the article tried to collect data and expert comments present in public discourse regarding the broad spectrum of the Program's impact on the socio-economic situation of various social groups and categories.

Key words: social inequality, "500+ Family" Programme, demographic policy, poverty reduction, family policy

Analysis objectives

The article is aimed at a critical analysis of the mechanisms and consequences of implementing the "500+ Family" Programme introduced in Poland in 2016. The article contains answers to the question: what are the effects of the Programme implementation from the perspective of various structural categories and social actors, which we can find in the Polish scientific and journalistic discourse? Answering the research question, the Authors present and organise the trends of critical and affirmative analysis of the "500+ Family" Programme alongside data to confirm or to contradict the concerns/presumptions of both the Programme critics and proponents.

The "500+ Family" Programme is a social policy instrument with a wide spectrum of influence on the quality of life as regards financial situation, level of social inequalities, labour market, mental health state, citizens' and women's empowerment. Thus, the critical analysis of the "500+ Family" Programme presented in the article draws one's attention to the significance of the social and cultural context for the effects of introducing the new instruments in demographic policy actually serving the purpose of reducing social inequalities.

The analysis has been based on two kinds of data:

- 1) a collection of the conducted simulations of economic and demographic effects of implementing the "500+ Family" Programme and the results of the conducted empirical studies concentrated on the current and future effects (Auleytner et al., 2016, 2016b; Bojanowska, 2017; Bojanowska et al., 2017; Brzezińska, 2017; Brzeziński & Najsztub, 2017; 2017a; CBOS, 2016, 2017; Gorau-Tańska et al., 2016; Grabowska et al., 2017; Karwacki & Lajstet, 2017; Karwacki & Lajstet, 2018; Magda, 2017; Magda et al., 2018; Szarfenberg, 2017a, 2017b, 2017c).
- 2) an analysis of the public discourse, where the source of our data were publications in major Polish opinion-forming daily, weekly and monthly newspapers, but also in major (most often visited) Internet portals published since 2015 which was the beginning of the discussion on the transfer of financial resources towards families with children

included in the election programme of the Law and Justice party. The statements, prognoses and diagnoses by columnists, politicians, as well as representatives of the scientific world published in journalistic texts have been taken account of. The discourse analysis slowed us down to define a set of expected, expected and unexpected consequences of the Programme. The selection of data, comments, threads or the research cited exemplified the public debate focused precisely within this set of consequences. We tried to reflect the full spectrum of evaluations and voices relating to the emerging consequences. We are aware that especially journalistic comments fully take into account subjective narratives about the Programme. However, our goal is to analyse the discourse around the Programme, which is so important for family policy in Poland.

We are perfectly aware that the data which we have access to may not allow one to provide comprehensive analyses or definite theses and that combining simulations, beliefs, opinions, estimations and statistics with the results from representative opinion polls subject to original author's analyses may raise doubts. The "500+ Family" Programme is still a new instrument of the Polish social policy, but one which undoubtedly triggers a wide spectrum of consequences for the functioning of the society. As sociologists observing various aspects of the social life and public policy in Poland, we have yet decided to present the Readers of this text with a set of data presented in the Polish, both academic and media, public sphere, organised in line with accepted paradigms and theoretical tools. In our opinion (taking into account the objectives of this text, the subject matter of the studies, as well as the problem which "organises" our analyses), academic expert opinions, data collected in representative samples, scientific simulations and prognoses are as important as media publications which strongly resonate within various social categories — publications which are the result of the public mood, and the ones which create the public mood. We sought to ensure that the data which we present and comment on in this text were comprehensive, although we allow for the possibility that some significant sets of data might have been omitted. Our standpoint is that a discussion with the theses included in this texts, a critical analysis of the presented data and their correlations with particular phenomena and processes (in the text, referred to as the consequences of the Programme) will prove creative both for the analysts of the social life in Poland, and for public decision makers in charge of the quality of life of all the structural categories.

In order to discuss the political and expert reactions to the Programme, we refer to the rhetoric of reaction by Albert O. Hirschman, who argues (1991) that any attempt at a radical change shall face opposition which consists in proving the ineffectiveness of the new solutions (futility thesis), their counter-effectiveness (perversity thesis) and their internal contradiction (jeopardy thesis). The proposal of three dimensions of Hirschman's rhetoric in the discussion with new solutions in the social sphere and the framework of public reforms is for us an analytical tool and a sensitising metaphor in ordering the debate, especially criticism of the Programme.

***Between demographic policy and reducing income gap:
the “500+ Family” Programme characteristic***

The “500+ Family” Programme is an instrument of family and demographic policy realised by the administration of the Law and Justice party. Law and Justice is a political party established in 2001 by the initiative of two brothers — Lech Kaczyński (President of the Republic of Poland in 2005–2010) and Jarosław Kaczyński. The party, combining in its Programme offer the ideas of social and national conservatism as well as solidarism and interventionism, has won the parliamentary elections twice, which enabled them to form a coalition government in 2005–2007, and since 2015 — a majority government. Law and Justice remains in political opposition to the Polish and European political formations which accuse this party of anti-Europeanism, populism and anti-democratic tendencies within the internal policies. According to the Law and Justice’s and its supporters’ narrative, this criticism is a result of the resistance against measures aimed to secure the interest of Poland and its citizens inside the country (e.g. by closing loopholes in the tax collection system, holding people engaged in cooperation with the communist system before the transformation which began in 1989 accountable, or fighting corruption) and within the international policies (protection of the Polish interest in economic relations with the European powers, opposition against compulsory quotas of refugees to allocate, protection of the core values in the face of the social and cultural transformations legally sanctioned in other countries). From the perspective of the subject matter of this article, the key issue is the fact that in their election campaign in 2015, Law and Justice highlighted the need for redistribution policy oriented towards stimulating fertility and improving the living conditions of families with children. The “500+ Family” Programme consisting in the monetary transfer to families with children may therefore be treated as one of the key assets of this party which decided about its electoral success. The remaining parties who competed in the campaign unambiguously considered this programme impossible to implement primarily due to the shortage of resources in the state budget. It was introduced on the basis of “the Law of the 11 of February 2016 on the State aid in raising children”. The monthly benefit amounting to PLN 500 is granted for every child in the family until they reach the age of 18. At the beginning of Programme implementation, the exception here was the firstborn child; in their case, the income criterion applies — PLN 800 per person in the family or PLN 1200 in the case of a child with disability (average monthly net income per person in the family). From July 1, 2019, the benefit of PLN 500 is available for every child in the family with no income criterion³. Monetary allowances obtained within other forms of social assistance are not counted as family income.

The main intended aim of the Programme is to increase the number of children born. There are also two other official aims of the Programme: 1) to improve the economic situation of families with children, and 2) to support the development of children by improving the economic situation of households which encourages them to invest the

³ These analyses were conducted before the change of criteria for the allocation of funds in the Programme.

resources from the Programme in education. Thus, the Programme is aimed at promoting processes which are vital for the continuity of the state: 1) increasing the demographic growth in the times of ageing European societies, 2) reducing the scale and scope of poverty of families with children, and 3) educational processes aimed at preparing the youngest generations for life, which entails considerable financial burden for people who support them, especially in the case of multi-child families⁴. The Programme was introduced by an arbitrary political decision, without a pilot study or a prepared evaluation procedure. In spite of that, according to the Law and Justice government, as well as many experts (Auleytner et al., 2016; Rymsza, 2017; Szarfenberg, 2017a), the redistribution of budgetary resources within the “500+ Family” Programme is to be an investment whose effects are spread over years.

According to the data from the Ministry of Family, Labour and Social Welfare (MRPiPS), the budget of the 500+ Programme in 2016 was PLN 17.2 bn (about EUR 4 bn 300 m), and in 2017 PLN 24.5 bn (about EUR 5bn 700 m). In total, since the beginning of the Programme functioning until July 2018, PLN 46.4 bn (about EUR 10 bn 700 m) was allocated to the families. In June 2017 the number of children entitled to the benefit from the “500+ Family” Programme amounted to 3.985.000 and it is 57.8% of all children under the age of 18. The researchers claim that 2.000.612 families are beneficiaries of the Programme. The largest share are families with two children (58%). Families with one child are 28%, and multi-child families are 14.6% (Bojanowska et al., 2017, p. 16). According to the data from the Ministry of July 2018, 2.435mln families participate in the Programme and it covers 53.7% children under 18. It is evident that the support from the “500+ Family” Programme is not used by over 40% of children in Poland and they are mostly the better-off families from bigger cities with one child. Independent analyses (Szarfenberg, 2017c) also prove that in 2016, the Programme was not used by 51.5% married couples with four and more children and 74% of single-parent families. In total, 55% of families with three and more children did not receive the 500+ benefit in 2016. This may be interpreted in three ways: 1) as a result of difficulties in filling in special application forms for the allowance by a large part of households, 2) as a result of delay in payment of the 500+ benefit by the communes, or 3) as deliberate omission (for ideological reasons) of single-parent families within the Programme (whereas it is the single-parent families which are at the greatest risk of poverty in Poland) (Morawski, Domitrz 2017).

It is worth stressing that family benefits or allowances similar to the “500+ Family” Programme exist in 23 countries of the EU (cf. Durasiewicz, 2017)⁵ but nowhere are they so high in relation to the minimum wage as in Poland. The sum of the benefit in Poland is high if compared with, for example, benefits in Germany: in Poland, it amounts

⁴ Cf: Justification of the Law on State aid in raising children: <https://www.mpips.gov.pl/archiwum-projekty-aktow-prawnych-/archiwum-projekty-ustaw/polityka-rodzinna/projekt-ustawy-o-pomocy-panstwa-w-wychowywaniu-dzieci/> (20.08.2018).

⁵ Analyses made by researchers from the WSP Korczak in Warsaw we received from prof. Mirosław Grewiński.

to approx. 12% of the average gross minimum nominal wage from 2015 and about 40% of the minimum pay, while in Germany such a benefit amounts to 15% of the minimum pay. What is more, the 500+ benefit is paid additionally, besides the earlier introduced addition to the family allowance: childcare allowance for the period of unpaid child-raising leave (this allowance amounts to approx. PLN 400 monthly) and other provisions, e.g. family allowances and allowances from social assistance (Goraus-Tańska et al., 2016). Some countries, e.g. the Czech Republic, are considering the implementation of an instrument similar to the Programme; however, there is a question of actual motivations behind such a decision — is it actually families, or maybe the support of the electorate⁶.

Obviously, the Programme faces resistance most of all from the political opposition. They criticise the Programme due to their aversion towards the Law and Justice party which implemented it, pointing out its cyclical-populist nature. In their views, the financial benefits are solely “magnets” for the worse-off, worse educated Law and Justice’s voters, “unable to cope with their lives” and having more than one child. Second of all, the implementation of the Programme will ruin the state budget. Thirdly, the Programme is criticised due to the too low selectiveness. The political opposition points out that the Programme should involve income criterion as regards all children. Fourthly, the criticism from the opposition politicians stresses the insufficient universality of the Programme. In their views, the income criterion in relation to the first born child should be cancelled⁷.

The specific social, cultural and economic conditionings of the post-transformational Poland are also the ground for revising popular convictions about social policy instruments which are to reduce income inequalities. Probably, one of the most popular ones is that large income discrepancies are harmful and bad always and everywhere; therefore, they should be levelled at all cost, no matter what tools are used for this purpose (high taxes for those with higher income, money transfers to those with the lowest income, etc.), ignoring the cultural, social, institutional and historical context. The analysis of the case of the “500+ Family” Programme proves that the instruments to level inequalities happen to be effective or ineffective depending on this context, and the ones which are insufficiently thought-out before the implementation may generate new inequalities.

⁶ The support for the ruling party, Law and Justice, since the beginning of 2018 till August 2018 was consistently high, regardless of the institution which surveyed the public opinion, oscillating between 34% and 43%.

⁷ As regards all these claims, see e.g. <https://www.tvp.info/23844451/opozycja-krytykuje-program-rodzina-500-plus-pieniadze-trafia-nie-do-kazdego-dziecka>; <https://www.tvp.info/38022192/opozycja-program-500-to-rozdawnictwo-zniecheca-kobiety-do-pracy>; <http://www.newsweek.pl/aplikacja-wpunkt/biznes/program-500-jest-dziurawy-opozycja-proponuje-alternatywne-rozwiazania,artykuly,378885,1.html>.

Ineffective, costly, harmful? A criticism of the “500+ Family” Programme in the public dispute from the perspective of the concept of the rhetoric of reaction

Critical opinions about the “500+ Family” Programme, both coming from the politicians of the current opposition and/or connected with them opinion makers, and those which appear in expert and scientific debate, may be organised by referring to the concept of the rhetoric of reaction by Albert O. Hirschman (1991). Hirschman highlighted that every proposal of a fundamental social and economic change encounters resistance of various interest groups and structural categories representatives, which consists in proving 1) the futility of the new solutions, 2) their perversity and 3) internal jeopardy.

In the first case, pointing out the ineffectiveness of the new solutions, the case is that the intended social transformation shall not be successful, and if any changes happen to occur as a result of its implementation, they are going to be superficial, apparent, illusory. However, they are certainly going to be exaggerated within the political propaganda for the sake of convincing the public opinion about the sensibility of the government’s actions. Thus, here lies the kind of criticism of the Programme in which it is stressed that the Programme only plays the role of “pork barrel”, cynically directed at the lowest social classes identified as the only electorate of the Law and Justice party. In other words, the “500+” as a pro-demographic Programme will not be successful, and it may not significantly contribute to achieving the aim of increasing fertility.

The conviction of the ineffectiveness of the new solutions is most frequently based on another conviction — about the principal constancy of the world, about people’s and social systems’ aversion and inability to change. Regarding the criticism of the Programme, here locate the convictions that, for example, the beneficiaries — because of their low cultural capitals and “social disabilities” which affect them — are simply going to “drink the money” aimed at improving the children’s situation. The “drinking of the money” coming from the “500+” Programme also means using them for consumption purposes far from realising the children’s interests. This group also contains the conviction that the “500+” is not going to encourage anyone to have children since fertility is independent of any kind of political or economic change (interestingly, this kind of critical opinions about the Programme have been expressed, for example, by Polish social workers, cf. Auleytner et al., 2016).

In the second case, which pertains to the counter-effectiveness, the opponents of the change stress that all purposive actions supposed to positively influence the solution of a social problem only cause the aggravation of the problem and the intensification of the phenomena which they were supposed to prevent. Perversity is the extreme case of the unintended consequences, which means that the effects of the implemented solutions are contrary to the assumed ones. In case of the Programme, this would mean deepening of the demographic problem, connected even with a retreat from the currently implemented women’s occupational activation policy in Poland. The analyses of the Structural Research Institute prove that the occupational activity of women is currently correlated with

higher fertility, and the financial resources going into the households from the “500+” Programme are deactivating women occupationally, which will consequently deepen the problem of low fertility in the future (Magda, 2017; Magda et al., 2018). What is worse, the Programme may deactivate not only women, but in general parents with low incomes. The critics complain that introducing the Programme nobody considered the problems which it may cause for small businesses. Already at this moment, difficulties are faced by small village shops or companies employing cleaning personnel, which have to cope with the decrease in the number of people interested in getting such jobs⁸. The summed-up benefits for children in the households are simply higher than the income from work. One may also fear that in the long-term perspective the income from work will decrease in the households receiving the child-raising benefit, and when the benefit disappears, there will be a dramatic growth of income inequalities which have been decreasing in Poland since 2015 (Goraus-Tańska et al., 2016). Also, experts highlight (Auleytner, 2017, p. 174–175) that if the resources from the “500+” Programme flow mainly to families from the lower income registers, including problem families, it is perhaps possible to achieve an increase in fertility, but only in educationally inefficient families from the lower social layers. This will result in a growing number of such children, who in the future will not become educated, economically efficient adults useful for the state, whose activity would be necessary within the specific Polish social security system (the occupationally active people maintain the retired when the latter had not accumulated profits from their previous work).

In the third case of indicating the internal jeopardy, the arguments raised are, first of all, that the costs of every reform are too big and exceed possible profits, and, secondly, and more importantly, that they threaten the existing changes which have already been accepted and appreciated by people. Every subsequent reform questions the sense of the previous one, which causes that the subsequent changes in fact lead to hampering the changes which have already occurred (or even to their reversal), including those highly demanded socially. The criticism emphasising the internal contradictions is primarily in line with the claims of all those who believe that the implementation of the Programme, especially if it was to last for the next year, will ruin the Polish budget. Moreover, the Programme is economically ineffective because the costs of its administration are too high⁹, not to mention the fact that currently there are not (since they have not been

⁸ According to Work Service, the largest Polish company in the sector of personal consulting services, HR restructuring, recruitment and workforce outsourcing (for whom the survey was conducted by Millward Brown, cf. *Migracje zarobkowe Polaków VIII* [Economic migrations of Poles No VIII], 2018), in connection with receiving the 500+ benefit, 1.5% of the working Poles considered resigning from their jobs. They were mainly women with low education and low income, working in small companies, in jobs which did not require high competences. This means that since in Poland there are over 16 mln people who are occupationally active, the resignation from work was considered by about 240k workers. However, data from the MRPIPS show that as a result of introducing the Programme, maximum 55k workers left their jobs (data from 2018).

⁹ This is the opinion by Leszek Balcerowicz, a famous economist responsible for the Polish transformation towards the free market economy in 1989 and former minister of finance, <https://>

assumed in the “500+” Programme) any instruments for verifying the allocation of the resources. Thus, we do not know who they go to, what share of them “is spent on children”, etc. The criticism regarding the high costs of the Programme points out to the fact that public funds are being wasted since they are allocated for transfers to well-off people (a considerable share of well-off people in Poland are multi-child families), whereas the one-child families, who may not be wealthy, are discriminated against. What is more important, though, is that the “500+” Programme may stop the current beneficial changes within the Polish social assistance system. This means that the Programme may take away the instruments from the already functioning institutions, such as centres for social integration, social integration clubs or Poviats Employment Offices, which for several years now have undertaken activities aimed at the activation of the socially excluded people to change their lives and mobilise them to occupational activity. So far the clients of these institutions in Poland have been stimulated to take up employment, however, because of the “500+” Programme the activation has been replaced by the redistribution of budget funds independent of taking up occupational activity. Additionally, money transfers within the Programme occur while there is a lack of developed social reintegration, that is services in the institutions which would promote the appropriate resources management: acquiring the awareness of goals in life, acquiring the ability and responsibility to raise children, the ability to fulfil the roles in the family, etc. In this way, a large number of properly trained social workers, occupational advisors, work trainers and social animators are still oriented towards occupational activation of their clients, however, the environment of their functioning has undergone a radical transformation due to the resources from the Programme. All these specialists are aware of the inadequacy of their instruments and the pointlessness of their actions in the current situation; their clients are rationally adapting to the new conditions (Karwacki & Lajstet, 2017). Therefore, there are voices which claim that the resources allocated to the Programme should be devoted to the activity of activation institutions, as well as the already existing nursery schools, preschools and all other forms of flexible child care (cf. Bojanowska et al., 2017, p. 27).

The consequences of the “500+ Family” Programme in the light of research and simulations

In the following collection, we have identified a number of consequences of the Programme discussed in public space (including academic discourse). Of course, we start the analysis from the “statutory” objectives of the Programme and then present data and elements of discourse around specific effects — and those widely discussed, but also those that are not at the centre of debates.

Increasing fertility

In order to appropriately assess whether the Programme influences fertility, the long-term perspective is obviously necessary. However, so far in the context of decreasing fertility, there is no question of perversity of the “500+ Family” Programme. On the contrary, fertility is increasing in Poland. The fertility rate in Poland — according to the data from the Polish Central Statistical Office (GUS)¹⁰ — amounted to 1.29 in 2015, but to 1.36 in 2016. In 2017, that is a year after the introduction of the Programme, the rate was 1.45. The data of GUS also show that in 2016, the number of live births was 382k and was bigger by 13k than in the previous year, and in 2017, there were about 402k births, that is more by the next 20k. However, this is not a stable trend because it results from the data from GUS that in the 1st quarter of 2018, there were 86k registered live births, that is 4k fewer than in the same period the year before (GUS, 2018b).

The critics of the optimistic approach presented by the Ministry indicate, however, that over the last two years the procreational decisions of Poles do not have to be correlated with the “500+” Programme but, for example, with a very good situation on the labour market and a considerable reduction of unemployment, which strengthens the sense of social security and income stability, and may contribute to making decisions to enlarge one’s family. The safety of employment may largely precipitate the procreation decisions, which is proved by Poles’ declarations in surveys conducted in the last years (Kotowska, 2014, p. 62). It may also be caused by the currently generally friendly atmosphere around the family (Kotowska, 2016). There have also been numerous opinions that the aim assumed in the “500+” Programme will not be achieved because “patching up the budget” is a highly complex operation which cannot be performed only by means of economic stimuli, especially in Poland at its current stage of development¹¹.

Reducing absolute poverty of families with children

The “500+ Family” Programme has significantly contributed to dealing with the issue of absolute poverty in Poland. The Programme has largely influenced especially the improvement of the economic situation of multi-child families, overrepresented among those who experience poverty in Poland (GUS, 2018a). Less significant is the Programme in the case of single-parent families, especially single mothers — the most at risk of

¹⁰ Cf. <https://stat.gov.pl/obszary-tematyczne/ludnosc/ludnosc/urodzenia-i-dzietnosc,34,1.html> (accessed 21.08.2018).

¹¹ As shown in studies and expert reports (Brzozowska, 2015; Kotowska et al., 2008; Sikorska, 2009), fertility in Poland is affected by a series of factors such as women’s occupational work, policy of women’s employment (including employers’ behaviours on the micro level in the situation of employing young women), perceptions of motherhood and fatherhood as burdensome in the world in which individual career is what counts, disadvantageous contradictory communications on methods of caring for children, inconvenient infrastructure and child-care institutions, unstable institution environment, lack of good and free social services in this area, prolonged advancement in women’s careers, their increasing level of education and lack of appropriate number of flats.

poverty and social exclusion in Poland (GUS, 2018a). The change which was implemented on the 1st August 2017 imposed on single parents who declare the intentions to use this Programme an additional obligation to present the certificate of the awarded child maintenance (whether they apply for the benefit for the first child — here the income criterion applies, or for the second and next children — without the income criterion). The interpretation may be that the legislator targets the support primarily at the nuclear family understood as the mother, the father and their children localised within the same territory (Murdock, 1949; cf. Cheal, 1993). It is impossible to escape the opinion that the perceptions of the Polish conservatives forming the PiS government about the “normal” or “desired” shape of the family stopped at the idealisations of the family from the 1950’s. Meanwhile, an important segment of the environment in which the Polish children are growing is constituted by 1.5 mln single mothers.

The MRPiPS estimations suggested that after the introduction of the “500+” Programme the number of people at risk of poverty may decrease by almost 1.5mln from 6.5mln, and in the case of children by almost 900k from 1.6mln. According to the analysis by the World Bank (Goraus-Tańska et al., 2017), thanks to the Programme, absolute poverty in Poland may be reduced by at least 1.1mln (from 2.9mln), and absolute poverty of children by at least 591k (from 772k). Ryszard Szarfenberg’s (2017a, 2017b) micro-simulations on tax-benefit models indicated that thanks to the Programme it is possible in the short-term perspective to achieve a decrease in absolute poverty by 2.6–3.9% (by 39–48% in relation to the starting level), and in children absolute poverty by 9.2–11% (77–94% in relation to the starting level).

The data from GUS for 2016 and the 1st quarter of 2017 showed that the reduction of poverty is a bit smaller than it was assumed in the simulations, but the decrease in the scope of absolute poverty and relative poverty in Poland is noticeable and considerable. In 2016 absolute poverty was experienced by almost 5% (7% in 2015) and relative poverty by a little bit less than 14% against almost 16% in 2015. According to the data from GUS, there will be a definite decrease in the poverty rates of children aged 0–17. In 2015, the decrease was 9%, and in 2016 5.8%. In the case of a family with at least four children this is a decrease from 18.1% to 14%. In the case of a family with three children — from 9% to 4.7%. In families with two children — from 4% to 2.7%.

A considerable decrease in poverty between 2015 and 2016, that is before and after the implementation of the “500+” Programme, was observed especially in such entities as multi-child families with three or more children to maintain (13.5% to 9%), households with a disabled person (from 9.1% to 7.5%), inhabitants of rural areas (from 11.3% to 8%) dwellers of towns below 20k (from 5.4% to 4%). There was also a decrease in the number of people living at the level of minimum subsistence from 5.5% to 4.9%. The number of people using social assistance support decreased by over 9%, which may be a result of both the “500+” Programme and the improving situation on the labour market (the unemployment rate in Poland in 2017 was the lowest for 27 years and amounts to 6%). The number of benefits paid out from social assistance decreased — for example the periodical benefit payments decreased by 50k (from 459k to 408k, Bojanowska, 2017, p. 250).

Invest in children from the level of households

As Marek Rymsza (2017, p. 11) claims, the orientation of the “500+” Programme towards investments in children as human capital is in accordance with the latest trends in the European social policy. The investment nature of the “500+” Programme is supposed to be manifested, among other things, by the fact that educational support since early childhood (thanks to the Programme funds) will create new knowledge and skills which will enable them to be conscious citizens, consumers and well prepared employers and employees. The natural assumptions of the legislator is one thing, and the reality of social life is the second one. An increase in financial resources at disposal in many families might not change the functioning patterns on these families at all. Additionally, these resources might not necessarily be used to support the development processes of children and in practice will not be able to level the disparities in opportunities resulting from one’s cultural capital.

The existing research shows that the Polish people allocate at least part of the resources from the “500+” Programme for children’s needs, their development and education, although there are also some voices — especially on the side of the social workers involved in the division of the Programme funds — that they are mainly spent in a way that is not consistent with their objective, primarily by dysfunctional families. The first survey after the implementation of the Programme (Auleytner et al., 2017) covered 100 representatives of families and 145 employees of social assistance institutions who distributed the funds from the Programme. Answering the question (directed at the families) about what they are going to spend the funds from the Programme on, the following aims were mentioned: additional sports and culture-related classes (67%), additional educational classes for children (58%), purchase of school materials (45%), electronic appliances (28%), day care or a nanny for the child (13%). The social workers indicated different purposes and they claimed that — as follows from their experience and observations — families will spend the money from the Programme mainly on the purchase of consumer goods, such as household appliances and food products, including stimulants (coffee, cigarettes and alcohol). Social workers also argued that part of parents and carers may get addicted to social provisions (this view was shared by 75% of the respondents) and may withdraw from occupational activity (86%). A different judgement of what the funds will be spent on results from the fact that social workers assess the Programme from the perspective of needs and current practices of “their” clients of social assistance. However, they are unable to see the families who receive the benefit from the Programme but they are outside the social assistance system (social assistance clients are no more than 10–15% of all the beneficiaries of the Programme).

The second survey was the all-Poland’s opinion poll conducted by the Polish Public Opinion Research Centre (CBOS, 2016). It covered 3320 households which receive the 500+ benefit. The respondents were asked if the resources from the “500+ Family” Programme enable them to make decisions which would not be made without it. And, in the case of 16% of households, parents decided on paying or increasing pocket money to

their children. 4% of the respondents decided to employ a babysitter or send the child to nursery or pre-school, and 3% decided to use non-public educational institution which they would not be able to afford without the funds from the Programme. It is worth noticing that these are yet small expenditures which targeted (in accordance with the legislator's intention) within the resources to be used from the "500+ Family" Programme.

Boosting consumption, stimulating the market, increasing revenue from VAT

The "500+ Family" Programme is a yearly PLN 24 bn which goes to the consumer market of goods and services. Part of this money returns to the state budget in form of direct and indirect taxes. This resources "secure" jobs, pay and profits for employers and employees and may be treated as a flywheel for the Polish economy over the last two years (Goraus-Tańska et al., 2016).

In the survey by CBOS (2016), the respondents were asked whether they had incurred any expenses which would not have been incurred if it had not been for the 500+ benefit. The affirmative responses concerned the purchase of the following products and services: clothes (31%), shoes (29%), summer holiday camp or vacation stay (22%), books (22%), additional classes for children (20%), food (17%), medicine (15%) and visits to the dentist's (11%). The respondents declarations are in line with the actual increase in the consumption which started in the 3rd quarter of 2016. Then, the consumption in Poland grew actually by 3.9%. Towards the end of 2016 — by 4.2%, which has been the best result for the last 8 years. It is worth analysing the retail sale (GUS provide these data). In March 2017, it grew by 9.7%. In a monthly perspective, it increased by as much as 16.5%. The biggest growth was observed in the sale of petrol (annually by 23.6%), clothes and shoes (by 20.3%), furniture, household appliances (18.1%). In 2016, Polish people spent as much as PLN 9.6 bn only on the purchase of household appliances. This is by nearly one billion zloty more than the previous year. Also, a considerable increase in consumer interest in travelling for recreational purposes has been observed. However, one needs to bear in mind that Poles also benefit from an increase in earnings (according to data from March 2018, 6.7% increase in earnings in enterprises) and an increase in employment (by 3.7% in the corresponding moment).

According to the Ministry of Finance, the revenues from the VAT amounted to PLN 157 bln in 2017 in Poland and were higher by 23% as compared with the previous year.

Increasing the support for the political party (populism)

At the beginning of the implementation of the "500+ Family" Programme the political opposition did not know what position to take in relation to it. The most frequent was the attitude which undermined the Programme, whereas it is difficult to find arguments in writing formed by the opposition — they are rather opinions presented in the media

or the parliament¹². Currently, however, the opposition has changed their attitude and they intend to develop the Programme, even by covering all the children in Poland by it, regardless of the family structure.

There is nothing unusual about that, since the research shows that Poles see much more advantages than disadvantages in the “500+ Family” Programme. As follows from the latest survey by CBOS (2017), the level of the Programme acceptance by the Polish people is very high and currently amounts to 77%, with 20% of social disapproval. The government’s activities for the good of the family were evaluated in 1996–2013 by the Poles as unsatisfactory or satisfactory, and currently they are evaluated as good (42%) or very good (10%). Within one year there was an increase in the percentage of respondents who linked the activities of the “500+ Family” Programme with an increase in the birth rate (from 16% to 24%). In the opinions of the respondents, thanks to the “500+ Family” Programme, families have the opportunity to dispose of the money more freely, their marital and family relations are improving, and parents have more time to spend with their children. The positive opinions about the Programme, more often than the average ones, come from people with lower financial status. The wealthier the respondents, the more indifferent they are as regards the Programme. Increasingly more Poles are convinced about the necessity to continue the Programme in the following years. The number of people convinced that the Programme is prospective and that the government or the next administrations will not withdraw from its execution has grown by as much as 38% over one year.

It is certain that the scale of the support for the ruling party is today linked with the implementation of the “500+ Family” Programme. As shown in the survey entitled “Motivations of voting for political parties” („Motywy głosowania na partie polityczne”) carried out by CBOS in May 2018, 15% of the respondents declaring their support for Law and Justice (Polish: Prawo i Sprawiedliwość, PiS) mentioned arguments on social solidarity manifested in the executed Programme. “PiS supporters stressed that the ruling party thinks about people more [than the former government — Author’s note]; that they care about the fate of the ordinary citizens, the fate of the poor, that they make Poland get out of poverty; they stated that the scope of poverty reduced and the people who used to be poor now live a better life. (...)” Every eighth (13%) voter of PiS justified their choice with their general support for the party’s Programme; they claimed that they have a good (the best) Programme, stressed the credibility of this political formation since they realise their Programme, fulfil their election promises (CBOS, 2018, p. 1). Among the reforms introduced by the PiS government the definitely strongest political argument to the advantage of this party is the very “500+ Family” Programme which is indicated by its every tenth voter (10%) as the justification for their future electoral decision. The next 6% of PiS proponents expressed positive opinions about the pro-family policy of the

¹² E.g. *Opozycja krytycznie o programie 500 plus. Debata w Sejmie w dniu 9 lutego 2016* [Opposition critical of the 500 plus Program. Debate in Sejm on 9th February 2016]— more at <https://fakty.interia.pl/polska/news-opozycja-krytycznie-o-programie-500-plus-debata-w-sejmie,nId,2142836> (accessed 12.10.2018).

ruling party, they mentioned that the government cares about the family, acts for the good of the family (ibid. 2). This support, based on the implementation of the “500+ Family” Programme ought to be connected with the fact that during the 2015 election campaign, the competitive parties representatives considered its implementation to be populist and impossible to execute due to the lack of resources in the state budget. In the public debate in Poland, a particularly often cited statement was that by the Minister of Finance in the PO government (the biggest power in the Polish parliament in 2007–2015), Jacek Rostowski claiming definitely that there would not be resources for that Programme in 2015–2019¹³. Currently, in the public debate, there are fewer and fewer voices about populism in relation to the Programme (but not in relation to the subsequent proposals by the ruling party representatives). It seems difficult to imagine today any real chances for the election success of a party which would declare their withdrawal from this Programme.

Occupational deactivation of women

The opponents of the “500+ Family” Programme indicated that its implementation may contribute to occupational deactivation of part of women, which in turn may bring negative consequences for the labour market and the economy, and in the long-term also for the women themselves, as they will be doomed to lower pensions due to their shorter terms of employment. It was estimated that as a result of the implementation of the “500+ Family” Programme as many as 200–250k women would leave the labour market (Myck, 2016).

The existing research shows that the “500+ Family” Programme has actually to some degree contributed to women’s occupational deactivation; however, not in all occupational groups nor educational categories. Interestingly, the first public opinion survey after the introduction of the Programme proved that Poles do not intend to leave jobs once their economic situation has improved as a result of obtaining the new allowance (CBOS, 2016). None of the respondents answered that they were going to quit their jobs, and 4% responded that they were going to get a job thanks to the functioning of the “500+ Family” Programme. Therefore, one may assume that the resources coming from the Programme enabled some families to arrange care for their children in the context of the decision to get employed. However, already after a year of the Programme functioning, 12% of the respondents of the same research centre (CBOS, 2017) knew of cases when mothers had left jobs because of receiving the benefit.

The first research into people’s economic activity after the introduction of the “500+ Family” Programme show differences in occupational activity of women over the last two years — before and after the introduction of the Programme (Magda, 2017). While in the group of women aged 20–49 both having no children and those with one, two, three or more, before the introduction of the Programme occupational activity had been

¹³ Cf. https://www.tvn24.pl/wideo/z-anteny/jacek-rostowski-nie-ma-pieniedzy-na-obietnice-pis-u,1473680.html?playlist_id=26848 (accessed: 27.08.2018).

growing, after the introduction this activity started to fall in all groups except for women without children. Most probably due to execution of the Programme, the labour market was left by about 40–55k women who joined the group of occupationally passive people. The labour market was left primarily by women with elementary and lower secondary education who generally have low income and who used to be employed in simple jobs. According to the analyses by the Institute of Structural Research (Magda, 2017; Magda et al., 2018), after 2016 women with children employment rate has changed in relation to the corresponding rate for women without children. These rates used to develop at a similar level, however, after implementing the Programme the employment rate of mothers is lower (according to experts from the Institute, it would be higher by 2–3% if there was no benefit). This means that the impact of the “500+ Family” Programme on the occupational deactivation of women is significant; however, it is not as dramatic as the simulations showed (Rozwadowska, 2017).

Increased sense of subjectivity of multi-child families

It seems obvious that the mechanism of the Programme, based on money transfer whose value depends on the number of children one has, will strengthen the sense of subjectivity of multi-child families. What we mean here is material security that allows one to feel dignity in connection with the possibility of a stable provision of family needs. The “Large Family Card”, which is an entitlement to discounts (e.g. on train, bus, cinema and museum tickets, etc.) which had been introduced in Poland earlier, already had a very positive reception by the environment of multi-child families (Bojanowska et al., 2017). Several-thousand-zloty money transfers for families with a larger number of children have become the subject of everyday discussion of Poles. A high transfer unconnected with work and other criteria is often considered unfair and undeserved. A columnist in the opinion-making daily “Gazeta Wyborcza”, Dominika Wielowieyska, said (and it is the expression of many Poles’ opinions): “This Programme is unfair! If a single mother exceeds the income threshold, she will not get any money — and for sure she is in a worse situation than a married couple with two children, who will get the PLN 500!” (Spór o 500+, 2016). From the perspective of the Programme’s beneficiaries it is yet a radical strengthening of their economic situation giving them new possibilities as regards satisfying their needs. So far, there has not been comprehensive research into increased sense of subjectivity and empowerment of the beneficiaries of the Programme; however, case studies focused on the quality of life of inhabitants of poverty enclave in one of the small towns in Poland (Chełmża) proved the fact that there is an increased sense of subjectivity and social security of poor multi-child family members (Karwacki & Lajstet, 2017).

Thus, thanks to the Programme, there occurs financial empowerment of families with children, which is linked with a decrease in poverty and inequalities, but it does not necessarily come down exclusively to increased consumption possibilities of the families. It is worth additionally stressing the aspect of dignity which contributes to the empowerment of the people who have so far been excluded from consumption. Thanks to

the resources from the Programme, people feel that they “are somebody”, that they can afford something more than survival, “living from hand to mouth” (cf. Karwacki & Lajstet, 2017). There appears also the argumentation (Rymsza, 2017) that the funds coming from the Programme area form of payment for women’s housework. Additionally, women’s empowerment has taken place, even in those households where there had been incidents of domestic violence towards them, since it is women who applied for the 500+ benefit and it is them who dispose of the money as they had provided their own bank account numbers in the application forms (CBOS, 2016).

Costs of running the Programme for the state’s budget

In 2016, the cost of executing the Programme was PLN 17.600 bn (the Programme started on the 1st April). The administration costs were PLN 315.3 m. The provisions were received by 3.8 m children. Every month, PLN 500 per child was received by 2.8 m parents, 40% of them obtained the benefit already for the first child. In 2017, the cost of the Programme implementation was PLN 23.166 bn, including 392.1 m costs of administration necessary for, among other things, employing additional workers dealing with formalities. PLN 2.97 m was spent on the promotion of the Programme (the most of this amount was spent on commercial spots on TV). This year, the expenses from the public budget on family policy increased from 2.5% to 3.66% GDP. In 2018, the guaranteed sum for the realisation of the Programme was PLN 24.479 bn. Obviously, the mentioned expenses may be compared with other positions in the state budget. Still, the Polish government spent PLN 37 bn on national defence in 2017. In the same year, the expenses on the educational subsidy was over PLN 42 bn, and in 2018, PLN 9.2 bn on science and higher education. Thus, the key question seems to be whether redistribution at such a high level allows to achieve the assumed, multi-dimensional objectives and whether the unexpected costs of introducing the Programme (not only financial, but also social and cultural) do not outweigh the profits (which is the subject matter of the analysis conducted in this paper).

Closing loopholes in the fiscal control apparatus to find budgetary resources necessary for the execution of the “500+ Family” Programme

The necessity to finance the “500+ Family” Programme has forced the government to develop practices of tightening the control over the VAT, and consequently, to reduce tax fraud and the scale of other fiscal offences. The Polish Supreme Chamber of Control (NIK) describes this fact as follows: “The effectiveness of the fiscal apparatus in preventing the VAT fraud has improved. In 2017 the revenue from VAT was higher by 24%, that is by PLN 30 bln, than in 2016. This was an effect of a good economic situation but also of the introduced changes and instruments which have improved its collection”¹⁴.

¹⁴ <https://www.nik.gov.pl/aktualnosci/wyzsze-dochody-z-vat.html> (accessed: 10.08.2018).

Changes in the profitability and tightening of expenses have been observed in state-owned companies which started to bring billion-value profits, undoubtedly significant in the context of financing the Programme. “During the first six months of 2016 state companies from the Polish Stock Exchange earned a bit over PLN 7 bln net. Now, after the first half of the year the statistics indicate almost PLN 15 bn. (...) Such great progress does not result from unusually low profits the year before. They were definitely higher than in two previous years¹⁵. The implementation of such a costly Programme undoubtedly means active measures aimed at securing financial resources in the public budget. The Law and Justice Party in their election campaign in 2015 communicated that they will attempt to level extortions and theft as regards the fiscal responsibilities of the citizens (and mainly of business entities) and ineffective strategies of managing the Treasury-owned companies so that the money could be directed to citizens within the concept of “a just state”.

A change in the continuity of social policy: a turn from activation towards transfer; transition from services to allowances

The “500+ Family” Programme is promoted as an initiative falling within the core of the investment social policy. The key challenge is currently to find ways to deal with tensions between the rapidly developing economy based on innovations and the risk of aggravating inequalities. The model of social investment in a welfare state (cf. Morel, Palier and Palme, 2012; Hamerijck, 2012) is an idea on how to cope with the main challenges of a highly qualified knowledge-based economy and provide people with access to good jobs, education, opportunities to acquire new skills. The public Programme expenses may therefore be oriented towards long-term goals resulting in an improvement of quality of life of the representatives of various social categories, popularisation of access to public services, multi-dimensional levelling of inequalities. The “500+ Family” Programme, according to some experts, is a chance to invest several tens of billions of the Polish zloty into the long-term economic development of the country and, most of all, social order based on reversed negative demographic trend, reduced scale of income gap, stimulating the potential to compensate children’s developmental needs. In the context of the implemented social policy concepts, it is worth paying attention to another aspect of the change which is connected with the realisation of the “500+” Programme. In Poland, together with the EU pre-accession Programmes (Poland joined the EU in 2004), the process of reforming the support systems for the unemployed and socially excluded was started. The focus was placed on the strategy of activation and mobilisation to occupational activity by means of an offer of services and instruments of work administration institutions, by establishing new institutions oriented at activation and reintegration practice of people experiencing social problems and remaining outside

¹⁵ <https://www.money.pl/gielda/wiadomosci/arttykul/spolki-skarbu-panstwa-wyniki-gielda,198,0,2366918.html> (accessed: 03.07.2018).

the labour market such as social integration centres, or social integration clubs), creating opportunities to establish social cooperatives where people experiencing marginalisation can realise professionally, by introducing an instrument of social contract (an optional form of support agreed by the social worker and the beneficiary which would regulate individual paths of the change in the client's situation). This strategy was based on social services which were to support the processes of empowering and autonomising people who had often been permanent beneficiaries of social assistance institutions.

However, the "500+ Family" Programme is a money transfer within the redistributive policy of the state. In the opinions of social workers, that is the people involved in the functioning of reintegration services institutions in Poland, this transfer deprives them of the possibility to act effectively and nullifies the existing activation practices. This means questioning the applicable strategies of action which demotivate one to undertake occupational activity, demobilising one to make life changes (cf. Sensa, 2017). At the same time, social workers point out that their earnings and income of their families are often definitely lower than the transfers unconnected with work, and which can be obtained by the clients of their institutions who they are trying to mobilise to being active, resourceful, to fulfilling their caring and parenting responsibilities¹⁶. According to the representatives of social services (Karwacki & Lajstet, 2018), such a one-dimension deficit levelling (only in the material sphere) will not change the social assistance system clients who will still suffer from deficits as regards the non-material resources, the lack of awareness nor experience in using their citizen rights which they are eligible for, they will still lack contact with social life institutions, and their families, marriages and partner relations will still remain unstable. The question here is that the "500+ Family" Programme exerted influence on the nature of social policy in Poland emphasising allowances, and in a sense, deprecating social services.

Increased sense of women's subjectivity, empowerment of women in situations

It occurs that funds from the "500+" Programme are a resource which enables women to gain financial independence, which may translate into their decisions to leave their husbands and partners from whom they suffer violence. Thus, the Programme funds have the potential to empower women and improve their decision-making positions based on financial security. Obviously, it is difficult to obtain the "hard" statistical data to prove this kind of phenomenon. The Ministry of Family, Labour and Social Policy, responsible for implementing the Programme, does not have such estimations. However, observations pertaining to the role of the 500+ benefits transfer in the autonomising decisions of women within their dysfunctional dependencies on men who harm them have emerged in

¹⁶ <http://praca.gazetaprawna.pl/artykuly/924578,pracownicy-osrodkow-pomocy-spoecznej-wy-nagrodzenie-przepracowanie.html>; <http://www.wykop.pl/ramka/4429901/pracownicy-mops-ostro-zarabiamy-mniej-niz-pobierajacy-500-plus-mamy-dosc/>; (accessed: 26.08.2018).

in the media statements by state officials, therapists, social workers and family assistants more and more often. “There are women who thanks to the 500 plus benefit were able to run away from home where they experienced violence — say psychologists and therapists. Victims rent flats and with their children, they try to start new lives. So far, money has been a barrier. Now, it’s changed”¹⁷. Renata Durda, the head of “Niebieska Linia” [“The Blue Line”] (all-Poland’s emergency number for victims of domestic violence), mentions women who have made the attempt to break away from violence thanks to the 500+. She says, “In some cases, this money has made the victims independent from the offenders. It is very often that when talking to women you can hear voices that they won’t leave their husband because: ‘I don’t have money’, ‘I won’t manage alone’, ‘I have no place to stay’. And fortunately, in some families this has successfully changed. We have such charges who come to us and say: now that I had got the money from the 500+ Programme I finally moved out. Together with my children”¹⁸.

Conclusions

Evaluated in retrospect, the Family 500+ Programme has inconclusive consequences. It has certainly not contributed to the accomplishment of the overarching demographic goal — a stable growth in fertility levels. However, it may be stated with equal certainty that it has contributed considerably to levelling out social inequalities in Poland, and has resulted in the empowerment of many families so far struggling with economic problems related, among other things, to the costs of children care and education. On the one hand, it has contributed to the country’s economic development by stimulating consumption, on the other, though, it has slightly weakened the so far strong tendency of Polish women to be active on the labour market.

The Family 500+ Programme should therefore be considered a social innovation with unforeseen consequences. It is our belief that no prior, appropriate evaluation of the possible effects of the Programme has resulted in its becoming an actual social policy tool aimed at making the social structure egalitarian with no sensitivity to the problems of one of the important segments of the Polish society — the middle class. It is an *in vivo* experiment of levelling inequalities that has generated, or at least highlighted, new inequalities.

The focus of discussions and studies on social inequalities is most often placed on those who have too little and thus bear the multidimensional consequences, and on those who have “too” much, with a clear intention — to bridge this gap! Over the years of transformation, policy (including social policy) has been brought down to responding

¹⁷ <http://www.tokfm.pl/Tokfm/7,103454,21219681,terapeuci-swiadczenie-500-plus-daje-szanse-na-wyrwanie-sie.html> (accessed: 20.10.2018).

¹⁸ *Ibidem*. In our analysis of the Programme, we pay attention to its consequences for the middle class, in the context of a sense of inequality, “poor care” by the state to the extent that the lower class felt. However, this is an issue worth developing in a separate text.

to the emerging problems (as a reaction to their scale): it is a set of tools which solve the problems of those who struggle with social problems, and the 'standard' basic public service package is maintained. It is a reactive, short-sighted policy which petrifies a lot of problems emerging in social assistance, work administration, rehabilitation, correction, education, health care, etc.

In the political process, some are made an offer, others are criticized, and yet some others are ignored. In our estimation, the ignored "third ones" are the middle class representatives whose needs and problems are consistently overlooked, while at the same time this is the social category which is to provide stable fuel for the state and its policy. The 500+ Programme was introduced in Poland in the circumstances when there were no similar public services (re)funded by the state and at the same time not directed only at the "disadvantaged" layers, which would support real egalitarianism, not just egalitarianism understood solely as improving the quality of life of the disadvantaged.

Poland is a country which, after 30 years of political transformation, still fails to satisfy by means of public funding the needs in the areas of healthcare (e.g. dental treatment), housing (most new flats are bought on long-term loans), pre-school education, or care for the elderly. We have low pensions (which is a social stressor) and the lack of institutions to care for the dependent generates pressure for considerable amounts of housework, especially on women. The middle class, despite paying taxes, for all these services must pay out of their own pockets, and considering their aspirations as regards children, the 500+ is not a good solution to their social and cultural problems, and thus to the developmental issues of the country, as long as it still seriously perceives the middle class as its driver of development.

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