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FROM POVERTY TO SOCIAL EXCLUSION

- POVERTY AND SOCIAL EXCLUSION
- SOCIAL EXCLUSION DIMENSIONS
- POLICIES TO COMBAT SOCIAL EXCLUSION
- INSTITUTIONS OF SOCIAL INTEGRATION
- EUROPEAN POLICY OF INTEGRATION

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FROM POVERTY TO SOCIAL EXCLUSION

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Research on the poverty has a long tradition in Poland and especially at the Institute of Labour and Social Studies (IPiSS). Surveys concerning difficult conditions of life of families were conducted also in the period of the real socialism, giving knowledge about the conditions of the society and postulating introduction of the appropriate solutions within the existing institutional and methodological framework.

In the nineties, when perturbations on the labour market came with the construction of the market economy and its quick modernisation, the system of social security, despite its institutional maturity and relatively important scale of disbursed funds, became unable to provide allowances for all groups of people affected by the violence of transformations. At that time the poverty became a visible and widely recognised social problem. Cognitive and methodological research and analysis were conducted. They were carried out on a larger scale by three research centres: Central Statistical Office (GUS), the Institute of Labour and Social Studies (IPiSS) and the World Bank.

The research conducted by the IPiSS in the methodological aspect put the measurements of poverty in order and recommended the use of approaches and indicators proven in practice and agreed with the GUS. They consolidated the method of providing information about the scale and depth of poverty in Poland, as well as strengthened its continuity. They also contributed to including more relevant methods of combating poverty and helping the poor in the process of social policy elaboration.

The years of research resulted in understanding and some kind of consent on the used conventions of poverty definition and measurement, despite related limitations and controversies. The awareness of limitations imposed by the adopted convention is very important. For example, the comparative studies have been using the category of the so-called relative poverty for a very long time. It is based on the definition of the threshold of poverty as a certain level of income, determined in some proportion to the average level of welfare (e.g. income or consumption per capita). The European statistics define three poverty thresholds: on the level of 40%, 50% or 60% of the average income or the median of income. The most often quoted statistics determine the poverty threshold (or the poverty line) at the level of 50% of the average income per person (or consumption unit) in a given period. In consequence, the poor from the countries on different level of development may, while having the same poverty rate, have completely different material situation. Also the analysis of the problem in time, where the poverty rate remains the same, indicates that the material situation of the poor may be significantly different.

What does it mean, when the rate of relative poverty increases and the average level of income is not reduced? It simply signifies the increase of social inequalities. The majority of the poor have less than a half of average income per person. Poland in the enlarged EU belongs to the countries where the rate of relative poverty is not much higher than in the majority of the EU countries. The lowest indicator can be found in Sweden and Czech Republic (1). But if the point of reference is not our average income but the average income in the European Union, then Poland, together with the Baltic countries, is situated at the end of the list.

The criticism of relative poverty is related mainly to the fact that the poverty rate may rise or remain unchanged while the national income increases. This indicator shows then that not everybody participates proportionally in this increase. Such regularities – inflexibility of poverty in relation to the growth – occur in some periods and in some regions, although this is not a typical phenomenon. Long-term economic growth, if it is accompanied by the increase of employment, usually corresponds with the decrease of poverty. If, however, the flexibility of poverty in relation to the growth is low, as it was in Poland and some of other new EU countries on the turn of decades, it is a signal of some social difficulties, in this case occurring due to the high dynamics of transformation and decrease of employment. Lack of automatic reaction, consisting of the decrease of poverty while the economy grows, is related to the phenomenon of the so-called jobless growth, characterising the dynamic economic transformations in Poland: high work effectiveness and restructuring of industry (described more widely in the article concerning labour).

Due to the problems with interpretation of relative poverty, there are many partisans of absolute poverty measurement. For example, the specialists of the World Bank use absolute measurements, different for different world regions (USD 2,15 or 4,30 per person daily, according to the purchasing power standard). In many countries, also the official measurements of poverty use the absolute measures. In Poland, in this case, the measures based on the consumption basket (basket of the minimum of existence, social intervention threshold, or threshold of income support for families) are used.

After Poland joined the EU, the research on poverty gathered new dynamics. The European Commission and Eurostat propose to enlarge the category of poverty by social exclusion, more widely introduce panel research, unify quantitative and qualitative research and postulate the creation of new measurements indicators. Moreover, fighting against poverty and social exclusion has become one of the goals of the social policy strategy of the EU, realised jointly with member countries.

The introduction of the category of social exclusion is an important fact in this new period. As a result there arises a question – is this only an external effect, related to the Union’s methodological conventions or is this a better category to explain contemporary social phenomena, also in Poland? Is it not sufficient to stand by the category of poverty, a phenomena that is understood, easy to recognise and measure?
We searched for answer to this question by enlarging and deepening the research on the conditions of life of population as well as new dimensions and areas of poverty and social exclusion within the project entitled *Poverty and social exclusion and methods of combating them*; we present some of its results in this issue of “Polityka Społeczna”.

Let us start with demonstration of differences between the category of poverty and of social exclusion – what is facilitated by the specification below.

<table>
<thead>
<tr>
<th>Poverty</th>
<th>Social exclusion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Material deprivation – situation of limited resources (and possibilities – enlarging the Sen’s conception)</td>
<td>Non-participation in social life – social isolation, marginalisation</td>
</tr>
<tr>
<td>A state</td>
<td>Indicates the lack of relationships between the individual and others</td>
</tr>
<tr>
<td></td>
<td>Indicates relations with institutions that discriminate the individual</td>
</tr>
<tr>
<td></td>
<td>A process, in which the accumulation of disadvantageous factors occurs, leading to exclusion</td>
</tr>
<tr>
<td></td>
<td>Is a multi-dimensional, multi-aspects phenomenon, The poverty may be a reason and a result of exclusion.</td>
</tr>
</tbody>
</table>

The *Polish National Strategy for Social Integration* indicated that people threatened by social exclusion:

– live in unfavourable economic conditions (material poverty);
– are affected by disadvantageous social processes occurring as a result of mass and dynamic development changes, e.g. deindustrialisation, crises, sudden fall of industries, regions;
– do not have the life capital giving them normal social position: the appropriate level of qualifications, existence on the labour market, family and make difficulties at the adaptation to the changing social and economic conditions;
– do not have access to the appropriate institutions allowing acquiring the life capital, its development and multiplication, as a result of deficiency of those institutions (educational, health protection...) due to: lack of priorities, lack of public funds, low effectiveness;
– are discriminated as a result of deficiency of the appropriate legislation as well as due to cultural prejudices and stereotypes;
– are characterised by features that make it difficult for them to use general social resources due to disability, addiction, long-term illness or other individual traits;
– are subject to destructive activity of other people: violence, blackmail, indoctrination.

On the whole, the social and political sense for the use of social exclusion category consists of stressing three issues:

1) indication of importance of other dimensions to human life than only material ones,
2) stressing the dynamics of the development and tendency of disadvantageous situations in the life of man to strengthen and change the approach. But it is in England where the most concrete programmes and actions for social integration are created (see the McAuley’s article in the present issue), and the contemporary research and reports on the poverty already generally use the wider category of social exclusion.

The fact that the usefulness of the social exclusion category for the research on social issues in Poland, being at the same time an expression of concern about public behaviours of fellow citizens, became obvious is indicated by, for example, the Polish debate on poverty**. It is not the traditionally understood poverty that constitutes the main social issue but the impoverishment of social bonds and deterioration of the quality of life in its participation dimension.

When the main reason of poverty is the lack of stable and legal job, as it is now in Poland, and the basic method of making poor families’ living is casual work, often illegal, also in form of periodical economic migration, new behaviours and social processes occur there. Some families in those conditions manage quite well from the material point of view: buy an old car to ensure mobility (public transport infrastructure often no longer exists in their locality), include children in the process of earning money, exchange goods and services. Their consumption also remains on a certain necessary level. The apartment is usually equipped with a refrigerator and a colour TV-set, children are well clothed. From the outside, the social problem could not be noticed. But the problem of those families consists of the fact that they do not participate in normal social life, and their children have minimum chances to get away from the situation in which their parents are stuck. It also concerns people who have earned their living abroad for many years. By cleaning and taking care of elder and chronically ill people in Berlin or Brussels, growing asparagus or cucumbers in Germany or strawberries in Sweden, the migrants do not improve their human capital. Having ‘worked their fingers to the bone’ they return to a country they know less and less about and, besides going to church, do not participate in any social events. They lose contact with their children, they no longer motivate them to have some achievements at school. They do not take care of them, do not raise them. The possibilities to return or enter the market of legal employment in Poland become reduced in time.

When the social exclusion becomes the fate of the growing number of social groups (non-participation in the normal life thanks to the job, education and social activity), then the democracy becomes seriously endangered. Excluded people stop behaving like citizens: do not participate in elections, do not pay taxes, do not intervene in public affairs, and become easily manipulated by radical slogans of politicians searching for capital for their ambitions.

* Ordered research project PBZ-MIN-006/H02/2003.
** Conducted on the turn of 2005/2006 in „Gazeta Wyborcza”, among others.
**INTRODUCTION**

In Britain as in much of Western Europe, social policy after 1945 was based on the assumption that families would be stable and that males would experience lifetime employment – the so-called male breadwinner model of social insurance. This approach broke down progressively after about 1960 as a result of changes in demography and, more recently, the consequences of globalisation. Women had fewer children; they became more educated and hence entered the labour force in increasing numbers. At the same time and perhaps as a consequence, divorce rates have risen: as a result there are now more single-parent households and more single-person households. From the 1970s, changes in the degree of protection enjoyed by manufacturing industry in developed economies has resulted in a shift in the geographical location of traditional mass production plants from Europe and North America to parts of the third world. Consequently, the degree of employment security enjoyed by semi-skilled – and even skilled – industrial workers in Europe has fallen (Hobson 2002, p. 9).

These structural changes in the economy and the labour market in particular, led to the emergence of groups in the population that were unprotected by the existing framework of social policy. In France, this led to the formulation of the concept of social exclusion and, subsequently, to the development of policies for the insertion of "les exclus". In Britain, at the same time, the focus of social concern was rather on poverty and deprivation.

For largely accidental reasons, in the 1980s, the French discourse on social exclusion – or possibly only the terminology from this discourse – was adopted by the European Commission. Consequently, social exclusion has become a preferred term in the setting of targets and the formulation of social protection policies by member states. These concerns have been transmitted to the new member states through their adoption of the so-called accuis communautaire².

The rest of this paper is devoted to a discussion of the way in which this French-inspired discourse on social exclusion has been adopted both by social policy analysts and policy makers in Britain. It consists of four sections: Section 2 describes the various concepts of social exclusion to be found in English discourse and their relationship to the concept of poverty. Section 3 deals with recent attempts to measure the scale of poverty and social exclusion in Britain. Section 4 discusses policies that have been adopted to combat poverty and social exclusion. Finally, Section 5 concludes.

**CONCEPTS OF POVERTY AND SOCIAL EXCLUSION**

Most analysts date the modern study of poverty to the work carried out by Seebohm Rowntree in the town of York at the end of the nineteenth century. Rowntree sought to determine the level of income (...) needed to obtain the minimum necessaries for the maintenance of merely physical efficiency (Rowntree 1901, p. 86). To do this, he specified and priced a very limited basket of consumer goods. Households with an income insufficient to purchase this basket were defined as poor. This approach introduces an absolute concept of poverty. Most studies of poverty in Britain until the 1970s adopted a similar approach. Insofar as the British government adopted anti-poverty policies (including national assistance proposed in the Beveridge Report – Social… 1942) they were also based on such a concept of poverty.

In the late 1960s, Peter Townsend undertook a major study of poverty in the United Kingdom. In it, he sought to broaden the concept of poverty. He stated:

Individuals, families and groups in the population can be said to be in poverty when they lack the resources to obtain the types of diet, participate in the activities and have the living conditions which are customary, or at least widely encouraged or approved, in societies to which they belong. Their resources are so seriously below those commanded by the average family or individual that they are in effect excluded from ordinary living patterns, customs and activities (Townsend 1979).

This concept of poverty came to be known as relative deprivation and it was seen by many analysts as containing the essential elements of social exclusion (Bradshaw 2003, p. 4).

The idea of poverty as relative deprivation was adopted in a second study of poverty in Britain and the methodology for determining what constituted (...) the ordinary living patterns, customs and activities was significantly improved by Mack and Lansley (1985). It was also used in two further studies, funded by the Joseph Rowntree Foundation (Gordon and Pantazis 1997; Gordon et al. 2000) and in a number of studies undertaken in Europe and other parts of the English-speaking world (Gordon 2005).

As pointed out above, the concept of social exclusion was first introduced in France in the 1970s and subsequently adopted by the European Community (European Union). Since then, it has been adopted by the British (and most other European) governments both as an objective for social policy and as framework concept for social statistics. The use of the term – and the concept – by economists and social policy analysts in Britain has been encouraged by its adoption as a thematic priority for the funding of social research by the Economic and Social Research Council. The widespread use of the term, however, has not been accompanied by a clarification of its meaning.

An analysis of the relevant British literature suggested that there were (at least) three discourses with different embedded meanings to the term social exclusion (Levitas 2005, p. 125). In the first, redistributive discourse, social exclusion is more or less aligned with relative deprivation. The basic problem of the poor is seen as a lack of resources – not just money, but also access to publicly provided services. And the appropriate policy response involves redistribution. This concept has predominated, certainly in the 1990s, among British critical social policy specialists.

A second discourse, more common in Europe, is more concerned with the lack of social integration experienced by "les exclus". This identifies social exclusion primarily with lack of paid work at either the individual or household level. Long-term unemployment and the social consequences of economic restructuring have been key concerns of the European Observatory in the 1990s. This concept of social exclusion has become more prominent in Britain after the election of the so-called New Labour government in 1997 and its adoption of Welfare to Work programmes.

There is a third discourse, which focuses upon the behavioural or moral deficiencies of problem groups. This was originally associated with ideas of the underclass put forward by the
American sociologist Charles Murray (1993) but espoused by the Conservative government – and vigorously criticised by critical social policy analysts. More recently, elements of this discourse – and of a concept of social exclusion in which particular groups “exclude themselves” are to be found in New labour’s policy initiatives.

THE MEASUREMENT OF POVERTY AND SOCIAL EXCLUSION

In this section, I distinguish between academic studies of poverty and social exclusion (where academic is defined to include estimates provided by think-tanks as well as university departments) on the one hand and official estimates on the other. First, then I describe two academic studies of poverty and social exclusion undertaken by David Gordon and his associates (Gordon et al. 2000) and by the New Policy Institute (Palmer 2003).

The Gordon study was undertaken by specialists from the Townsend Centre for International Poverty Research, together with scholars from SPRU and the Centre for Research in Social Policy at Loughborough University. The study defines poverty as multiple deprivation – in line with Townsend’s earlier work. The principal findings of the study are: at the end of 1999, some 26 percent of the population of Great Britain was living in poverty as measured in terms of low income and multiple deprivation. The numbers in poverty, based on government figures for low income and deprivation have risen sharply over the past two decades: in 1983, only 14 percent of the population was in poverty on these definitions. Depending on how it was defined, between 18 and 34 percent of children were in poverty. As might be expected, poverty rates among children were worse: in households without any workers; in lone-parent families; in households with a larger number of siblings; where a household member was suffering from a long-standing illness; in households of non-white ethnicity; in households living in local authority housing; in households in receipt of so-called Job-seeker’s Allowance or Income Support.

The study distinguishes between four dimensions of social exclusion: *impoverishment*. *Unemployment or labour market exclusion*: some 43 percent of adults have no paid work; more than one third of the population live in households in which no adult is in paid employment; given these numbers, one should be cautious about treating non-participation as social exclusion. *Service exclusion*: some 9.5 million people in Britain cannot afford adequate housing conditions; more than 5 percent of the population live in households that have been disconnected from water, gas, electricity or telephone services; some 7 percent of the population are excluded from four or more of a list of essential public and private services – either because they are unaffordable or unavailable. *Exclusion from social relations*: about 10 percent of the population is excluded by cost from five or more of the following activities: activities; about 20 percent are excluded from three or more social activities.

The New Policy Institute (2003) study is the sixth annual report that the New Policy Institute has produced on the nature and scale of poverty and social exclusion in Britain. The reports are organised around a set of indicators, which are intended to illuminate various aspects of the social health of the country. The areas addressed are: income; the position of children; the position of young people; the position of those aged 25 to retirement; the position of older people; the position of communities. Further, this sixth report focuses on regional variations in poverty across England, Scotland and Wales. (None of the NPI reports discuss the situation in Northern Ireland.)

The main findings of the sixth report into poverty and social exclusion in Britain can be summarised as follows: the downward trend in the number of people living in low-income households has continued; there are now fewer poor people in Britain that at any time in the 1990s. The main reason for the reduction in poverty has been the fall in joblessness. But the numbers in low-income working households has not fallen. Low pay is still a problem.

Benefits for pensioners, those with dependent children and the unemployed have risen faster than the cost of living. This, plus changes in the tax system has alleviated the poverty of some low-income households.

Around a quarter of young people fail to reach the basic level of educational attainment; there has been no reduction in the numbers leaving school without any qualification since 2000. There is no sign of any reduction in health inequalities since 1997; those on low incomes are much more likely to suffer serious health-related problems.

Across a range of indicators, problems of poverty and social exclusion are more prevalent in the North East than in other areas. London has particular problems centred on low income and work. Scotland has particular problems centred on health.

Matt Barnes has also provided estimates of social exclusion in Britain (Barnes 2005). These are based on successive waves of the British Household Panel Survey (BHPS). They are the only estimates that attempt to track social exclusion through time. Barnes also attempts to compare social exclusion in Britain with similarly defined exclusion in Europe – making use of three waves of the European Community household Panel Survey.

Barnes states that the concept of social exclusion involves a multi-dimensional notion of participation in society, involving a combination of physical, material, relational and societal needs over a period of time (Barnes 2005, p. 16). Because, in his empirical work, he is limited by the categories on which the BHPS has collected information, Barnes simplifies his measure of social exclusion to three dimensions: household economic deprivation, personal civic exclusion and personal health exclusion. In investigating the time pattern of social exclusion, Barnes borrows from the work of Stephen Jenkins (Jenkins and Rigg 2001) to distinguish between individuals who have experiences no exclusion, those who have experiences occasional exclusion, those who have experienced recurrent exclusion and, finally, those who have experienced persistent exclusion. The results of his study are summarised in Table 1.

### Table 1. Longitudinal Patterns of Disadvantage among Working – age Adults: 1991–1999 (column percent)

<table>
<thead>
<tr>
<th>Dimensions of Disadvantage</th>
<th>Economic</th>
<th>Social</th>
<th>Health</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>70</td>
<td>68.5</td>
<td>64</td>
</tr>
<tr>
<td>Occasional</td>
<td>10</td>
<td>11</td>
<td>15</td>
</tr>
<tr>
<td>Recurrent</td>
<td>5</td>
<td>6.5</td>
<td>9</td>
</tr>
<tr>
<td>Persistent</td>
<td>16</td>
<td>14.5</td>
<td>12.5</td>
</tr>
</tbody>
</table>

Adapted from M. Barnes Social Exclusion in Great Britain, Ashgate, Aldershot, 2005, Table 5.7.

In addition to the Townsend Centre at the University of Bristol (which was responsible for carrying out the millennium survey of poverty and social exclusion, referred to above) a number of other universities and university institutes have been involved in the study of poverty and social exclusion in Britain since the early 1990s. Perhaps the most important are the centre for the Analysis of Social Exclusion (CASE) at the London School of Economics and the Institute for Social and Economic Research (ISER) at the University of Essex. CASE has published a number of studies relating to special aspects of poverty and social exclusion that have been conveniently collected into a single volume (Hills, Le Grand and Piachaud 2004). Alternatively, recent working papers can be downloaded from the CASE website (www.sticerd.lse.ac.uk/case/).

The ISER is responsible for running the BHPS and most of its
studies make use of this data source. They can, for the most part be accessed through its website (www.iser.essex.ac.uk/). Mention should perhaps also be made of the Social Policy Research Unit at the University of York, run by Jonathan Bradshaw. This unit has a somewhat different focus from CASE and the ISER, being concerned more explicitly with the assessment of policies (…) for the provision of services to support people made vulnerable by poverty. More information about the range of work undertaken by the unit may be obtained from its website (www.york.ac.uk/inst/spru/).

Turning now to official analyses of poverty and social exclusion: for many years the British government refused to specify a poverty line – and hence to produce official estimates of the scale of poverty in Britain. Rather, it produced statistics on what were referred to as Households below Average Income (HBAI). The data used in producing these statistics were taken from the Family Expenditure Survey (and, more recently have come from the Family Resources Survey). Thus, certainly until the end of the twentieth century, the official British approach to poverty made use of an indirect measure of need – and one that emphasised material consumption rather than relative deprivation. Analysts have defined poverty as living in a household with less than half average household income. Data on the scale of poverty in this definition are available at least since 1961 (Pantazis et al. 2005, p. 5). They show that, in the 1960s and early 1970s, some 11–14 percent of households were poor. This fell to as little as 8 percent in 1977–78. After that date poverty rose inexorably until, at the end of the century some 25 percent of the population were living in poverty. Under the Labour government poverty has begun to fall but is still in excess of 20 percent.

The new century has been associated with a change in official attitudes towards poverty and social exclusion. In 1999, the Department for Social Security published a paper Opportunity for All: tackling poverty and social exclusion (OIA). This provided a selection of forty indicators on the basis of which the government’s progress in reducing poverty and social exclusion would be assessed. Although OIA does not distinguish clearly between poverty and social exclusion, it does indicate that the government has moved away from an exclusive focus upon income-based conceptions of poverty, since the indicators include health, education and social issues. Since 1999 the government has produced a series of reports designed to show how much progress has been made in tackling various forms of disadvantage.

When it took office in 1997, the new Labour government established a Social Exclusion Unit (SEU) – to (…) provide joined-up solutions to joined-up problems by analysing intractable issues that did not fall within the remit of any single department. The SEU did not produce a clear definition of what it understood by social exclusion, nor has it produced definitive estimates of the scale of social exclusion in Britain. Rather it has focused upon its initial remit, producing reports and recommendations on such topics as truancy and school exclusions, teenage pregnancies, poor neighbourhoods and rough sleeping. More recently, it has discussed reducing re-offending, young runaways and the role of transport in determining access to services. (For more details on the activities of the SEU and copies of its reports see www.socialexclusionunit.gov.uk/).

From the nineteenth century on, researchers on poverty have disagreed about whether geographical concentrations of poverty are the result of the joint operation of multiple neighbourhood sources of disadvantage – or simply the assembly of those made poor by the operation of general social forces. A second source of disagreement has concerned the appropriateness of area-based anti-poverty policies (Glennerster et al. 1999; see also Smith 1999 and Tunstall and Lupton 2003). In the late twentieth century, the British government has come to accept that some regions or areas suffer from multiple sources of disadvantage and that this results in concentrations of social exclusion. As a result, it believes that it is worth developing area-based anti-poverty policies to combat this social exclusion.

In the early post-war period, it was argued, (…) a high tide floats all boats. That is, if the economy is operated at a sufficiently high level of demand, full employment will be achieved – and the major source of social exclusion – unemployment will be eliminated. More recently, it has been suggested that there exist pools of people who are effectively not in the labour force. Hence even when the economy grows strongly, they remain cut off from the labour market. These are the long-term unemployed and the least skilled. They are unlikely to be reincorporated in the labour market before inflation takes off and the government is forced to reverse its macro-economic policies. What is required to include these people are specific economic, educational and training policies that focus on the excluded. Since the excluded are likely to live in particular areas, these policies can, perhaps should be area-based.

These arguments have lead to a number of responses. The government has published a statistical assessment of the scale of multiple deprivation in each local authority area in the country. The first version of this was published in 1998. The indices were modified and a new version published in 2000; a third improved version was prepared in 2004. (In principle, this is available for downloading but I have been unable to to identify the exact web address where it is available). The Social Exclusion Unit has developed a national strategy for neighbourhood renewal and have published a report setting this out on their website. In its second five-year programme, CASE has included an Area strand – which is designed to assess the appropriateness of area-based strategies for tackling local concentrations of poverty and social exclusion. The content of this research programme is spelled out in more detail in (Glennerster et al. 1999).

POLICIES TO COMBAT POVERTY AND SOCIAL EXCLUSION

As I have pointed out above, when it took office in 1997, the new Labour government changed the way in which poverty was officially conceptualised in Britain. It moved towards ideas of relative deprivation. It also at least adopted the European language of social exclusion. Further, it established the Social Exclusion Unit and set up a framework by which progress in reducing or eliminating deprivation might be assessed. Finally, it explicitly adopted the goal of eliminating child poverty by 2020. But one may still ask whether this new focus on social exclusion has resulted in any significant change in anti-poverty policies?

Critics, particularly those associated with so-called critical social policy analysis point out that the European Commission’s adoption of the language of social exclusion in the 1980s was intended to assuage the opposition to anti-poverty policies on the part of the Thatcher and Kohl governments. They go on to assert that this failed and, in Britain at least, the decade witnessed the sharpest and most prolonged increase in poverty and inequality in the twentieth century. Others suggest that the adoption of the language of social exclusion in Europe in the 1980s diverted attention away from the politically divisive issue of redistribution as a way of tackling material deprivation. Finally, there are those who suggest that the use of the language of social exclusion was associated with the re-introduction of the so-called moral underclass discourse. This seems to be confirmed by the range of topics tackled initially by the newly formed Social Exclusion Unit.

In my opinion, however, it would be wrong to dismiss the new emphasis on social exclusion as simply rhetoric. As has been pointed out above: the government has not shied away from talking about the problem of poverty in Britain and of setting explicit targets for its reduction. Further, as I pointed out above, poverty has begun to fall – at least in part as a result of government policies.
(Piachaud and Sutherland 2004). It is true, however, that many government initiatives seem to treat social inclusion as equivalent to participation in paid employment, but the so-called New Deal, the adoption of a national minimum wage and the introduction of Working Families’ Tax Credit have noticeably improved the lot of many poor households.

While it is true that the adoption of the language and concept of social exclusion is more than mere rhetoric. It is not the case that government social policy has addressed the full range of issues identified by analysts. It has still done little to deal with problems associated with social housing and neighbourhood disadvantage. Rather it has seemed to prefer to blame the anti-social behaviour of residents – and to adopt punitive strategies to resolve acute social problems.

CONCLUSION

There is a long history of studying poverty in Britain, dating back at least to the work of Charles Booth in the middle of the nineteenth century. But the measurement of poverty was probably first undertaken by Rowntree and his adoption of an absolute concept influenced both academic research and public policy for the next fifty or sixty years. In the late 1960s, however, Townsend introduced the concept of relative deprivation. This conception has been modified and improved and it has formed the basis for the academic study of poverty, not only in Britain but in Europe and much of the English-speaking world.

The concept of social exclusion seems to have originated in France in the late 1970s, but it has been widely adopted in Europe – both by governments and by academic researchers. There remains, however, a measure of uncertainty about what it entails. In Britain, many analysts continue to emphasise aspects of economic deprivation; in Europe, more attention is paid to the issue of lack of participation. There is a third aspect, which overlaps with debates about the existence and social significance of the so-called underclass.

Most academic studies in Britain have focused upon relative deprivation, but Matt Barnes has made use of the BHPS to produce estimates of social exclusion – understood to include not only economic deprivation but also both social isolation and health problems – in dynamic perspective.

Official conceptions of poverty in Britain for most of the twentieth century relied on estimates of household income. Published statistics showed that poverty in this sense was relatively low and falling in the 1960s and 1970s. Since then, it has risen inexorably and at the end of the century some 25 percent of the population lived in households with an income less than half the household average.

The new Labour government, which took office in 1997, not only adopted the language of social exclusion but also adopted a range of policies designed to reduce it. Initially, the emphasis appears to have been on social exclusion understood primarily in terms of economic disadvantage. Changes in tax and social security policy (and fiscal drag) have resulted in a measure of redistribution. This has improved the lot of a number of poor families – particularly those with children.

At the same time, other policies encouraged social inclusion, understood primarily as greater participation in paid employment. Government policy has been remarkably successful at reducing unemployment and increasing employment. It has also sought to "make work pay" by reducing or eliminating poverty traps.

On the other hand, government policy has done little to reduce other aspects of social exclusion. There are still areas of multiple social disadvantage, of poor housing and inadequate access to services, of ethnic segregation and racial tension. Rather than adopting policies to eliminate the root causes of this disadvantage, the government has preferred to introduce measures to penalise or punish the behaviour that results. Indeed, it is possible to suggest that there has been an evolution in the government’s understanding of social exclusion. Recent speeches by government ministers, and particularly the Prime Minister, have tended to privilege the so-called moral underclass discourse.

1 As far as I can ascertain, it was due to the fact that a majority of officials in the relevant DG in Brussels were French, or at least francophone; they also felt more at home with Durkheimian concepts of social solidarity than with the individualism implicit in the Anglo-Saxon approach through a discourse of poverty.

2 As exemplified by their obligation to adopt National Action Plans for social inclusion.

3 The most recent reports have been issued by the Department of Work and Pensions.

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EU AND POLISH POLICY TO PROMOTE SOCIAL INTEGRATION – NATIONAL ACTION PLANS ON SOCIAL INCLUSION AND THEIR IMPLEMENTATION

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INTRODUCTION – OPEN METHOD OF CO-ORDINATION – POLICY COORDINATION BETWEEN EU MEMBERS

The launch of the European Lisbon Strategy in 2000 brought about the new way of developing social policies on European level, called the Open Method of Co-ordination. The EU tends towards the modernisation of its social model basing on common values of social justice as well as active participation of its citizens in economic and social life. In this context, the OMC is designed to strengthen the co-ordination and exchange of experiences between member states in modernisation and improvement of policies. It aims at constructive exchange of experiences and agreeing on common goals, good practices and good governance. The OMC is a ‘soft’ method that does not interfere with the principle of subsidiarity in the design and implementation of social policies at a national level.

The open method of co-ordination is a process that is performed collectively involving the representatives of all member states. This is done through the meeting of government representatives in the Social Protection Committee, involvement of stakeholders on EU and national levels (civil society, social partners) as well as consulting experts who are involved, among others, in the work on developing indicators in the Indicators Sub-Group. The process is also done empirically through multilateral consultations on selected policy items.

Originally, the Open Method of Co-ordination covered the objective that was elaborated in Lisbon, which was social inclusion. First National Action Plans for Social Inclusion were prepared by EU-15 member states in 2000. A year after, in 2001, the OMC was enlarged to the pension systems. The third, last part of the OMC covering health care and long-term schemes was added in 2004.

The OMC covers several fields of policy co-ordination. First, there is a political agreement on common objectives. How the objectives are achieved are monitored by agreed common indicators. Objectives are translated into the national and regional policies though national reports that are subject to common analysis and assessment that is provided in the Joint Reports prepared by the European Council and European Commission.

Between 2000 and 2006 the implementation of the OMC evolved. This included the objectives, indicators and reporting. From 2006, the three strands of the OMC were joined into one streamlined process, the Open Method of Co-ordination on Social Protection and Social Inclusion (see: Figure 1). The aim of streamlining process is to achieve first better interactions and synergies within the strands of social policy as well as to achieve better co-ordination of economic, labour market and social policies within the EU member states.

First National Reports on Social Protection and Social Inclusion were submitted to the European Commission in September 2006. They cover years 2006–2008. From 2008, both National Reports in social field and National Reform Programmes that cover the government actions aimed at improving economic growth and situation on the labour market will be prepared in parallel. This will help the two processes to mutually interact, in order to achieve objections formulated in the Lisbon strategy.

Within the new National Reports it was agreed that National Action Plans on Social Inclusion will form their integral part, with clear visibility, so that the achievement and dynamics of the initiated processes are not lost in the new approach.

In order to achieve the goal of the streamlining process, the EU member states also agreed on common objectives in the field of social policy*. In March 2006, the European Council adopted a new framework for the social protection and social inclusion process. There is a new set of common objectives: Three overarching objectives and objectives for each of the three policy areas of social inclusion, pensions and health and long-term care.

![Figure 1. Streamlined OMC in the social field](image)

The overarching objectives (a) – (c), are to promote:

a) social cohesion, equality between men and women and equal opportunities for all through adequate, accessible, financially sustainable, adaptable and efficient social protection systems and social inclusion policies;

b) effective and mutual interaction between the Lisbon objectives of greater economic growth, more and better jobs and greater social cohesion, and with the EU’s Sustainable Development Strategy;

c) good governance, transparency and the involvement of stakeholders in the design, implementation and monitoring of policy. Subsequent objectives cover the three strands of the streamlined OMC process. In the field of social inclusion, these objectives are focused to have a decisive impact on the eradication of poverty and social exclusion by ensuring:

d) access for all to the resources, rights and services needed for participation in society, preventing and addressing exclusion, and fighting all forms of discrimination leading to exclusion;

e) the active social inclusion of all, both by promoting participation in the labour market and by fighting poverty and exclusion;

f) the social inclusion policies are well-coordinated and involve all levels of government and relevant actors, including people experiencing poverty, that they are efficient and effective and mainstreamed into all relevant public policies, including economic, budgetary, education and training policies and structural fund (notably ESF) programmes.

It should be noted that the new objectives were adopted by EU-25 member states, which means that Poland, similarly to other new member states participated in the streamlined OMC process from its beginning. This is contrary to the previous process, as new member states prepared their first National Action Plans on Social Inclusion with relation to objectives that were prepared and adopted by EU-15 countries.

The final component of the new social inclusion process is the list of indicators. Within the 2005 and 2006, the Indicators Sub-group of the Social Protection Committee discussed and proposed a revised set of indicators that are aligned with the new objectives. The indicators are aimed at measuring both performance and outcomes as well as impact of policies that are supposed to influence social cohesion. The list of indicators is assigned to the adopted objectives.

It should be stressed that the role of indicators is not to provide a simple comparison between the countries, but rather as developing a common framework for diagnosis and setting priorities, identifying and comparing best practice and monitoring progress and targeting. Agreed indicators are used in National Strategy Reports as well as in the Joint Reports on Social Protection and Social Inclusion, prepared by the Commission and the Council. Indicators are also available to everybody through the web site of Eurostat.

POLAND’S ROAD TO THE OPEN METHOD OF CO-ORDINATION

As it was mentioned before, Poland and other new member states entered the OMC when the social inclusion and pension strands were already implemented by the old member states. First National Action Plans on Social Inclusion were to be submitted by EU-10 member states already in August 2004, only a few months after the accession to the EU.

In order to prepare Poland and other new member states for the full participation in the OMC, the Commission launched the process of preparation of Joint Inclusion Memoranda (JIMs) that were mutually agreed documents between acceding country and the European Commission. However, the role of the JIM was to present the current policy of the country in the light of the Nice and Leaken objectives, rather than formulating policy priorities in the future.

First National Action Plan for Social Inclusion for Poland was submitted in July 2004 and covered the period between 2004 and 2006. From 2006 both new and old member states prepare their NAPs/Inclusion in the framework of integrated reports, covering the same period.

Preparation of all three documents for Poland is also embedded in the national context. Namely, in 2004 a National Strategy for Social Inclusion (NSIS) was prepared. The strategy was prepared by the broad Taskforce, encompassing the representatives of government, local governments, social partners, non-governmental organisations and international institutions. The strategy formulates long-term recommendations for social integration policy in Poland. As the strategy covers the period until 2010, it points out the strategic directions that are followed in the National Action Plans.

In the framework of strategic goals formulated in the NSIS, the National Action Plan for Social Inclusion for 2004–2006 formulated four main priorities:

- educational, social and health activities protecting against exclusion and supporting equal start of children and youth;
- further development of social safety net, fighting poverty and exclusion;
- activation and integration of groups threatened with social exclusion;
- development of public social service and institutional development of social services and their co-ordination.

The first NAP/Inclusion followed the objectives and targets formulated in NSIS.

As a part of the OMC process, the European Commission prepared assessment and recommendations for Poland, based on the submitted National Action Plan. The challenges formulated by the Commission in 2005 Joint Inclusion Report were as follows:

- to reverse the very negative employment and poverty trends by defining a policy framework encompassing social inclusion priorities and employment creation measures;
- to improve access to the labour market of people with low qualifications, young unemployed persons and people with disabilities;
- to step up administrative capacity, strengthen social policy institutions and improve policy coordination at local level;
- to provide adequate support to large families, families with disabled children and promote affordable housing for low/moderate income households;
- to consolidate the reform of the pension system, notably by organising the conversion of funded pension savings into safe annuities, addressing the issue of raising employment rate of older workers and equalising retirement age conditions for women and men.

After the assessment performed in 2006 it should be noticed that not all of the actions were implemented as planned. It is difficult to assess the implementation of the NAP, as the evaluation table prepared for monitoring could not be followed. The main difficulties were as follows:

- lack of ranking of the indicators;
- lack of target values for the indicators;
- not always adequate matching of activities with priorities and indicators with activities;
- inadequate choice of activities.

The National Action Plan for Social Inclusion for 2006–2008, prepared within the framework of the National Strategy Report for Social Protection and Social Inclusion (NSR) builds on the experiences from the implementation and assessment of the first NAP. It also pursues to continue actions initiated in the period 2004–2006. Following the common guidelines for the preparation of the NSR, there are three main priorities formulated in the NAP/Inclusion that are sub-divided into specific actions.

The first priority is the support for families with children. Within this priority, three actions are planned:

1. Development of the integrated family support system, including:
   - family support programme before and after childbirth;
   - development of actions supporting families helpless in respect to care and education issues;
   - development of social housing;
   - development of civic and family counselling.

2. Development of the income support system, including the revision and further development of the following:
   - Family benefits system;
   - Scholarship system;
   - System of housing benefits;
   - Food support;
   - Changes in the tax system.

3. Supporting reconciling work and family life, through:

Figure 2. Interactions between NSIS and OMC reports in Poland

Joint Inclusion Memorandum December 2003
National Social Inclusion Strategy 2004-2010
improvement of the social security of employees after childbirth; development of care services; promotion of flexible forms of employment for parents and guardians.

The second priority is the inclusion by activation. This priority focuses on activating social policy measures that lead to the social inclusion through activation of individuals at risk of social exclusion and their integration with the labour market. This priority includes the following actions:

1. Reform of tools and instruments for active inclusion:
   - Activating formula of social welfare benefits;
   - New application of social tools;
   - Instruments for active inclusion;
   - Activation and inclusion of the disabled.
2. Development of the public-social partnership:
   - defining the term of public utility social services;
   - unifying the procedure for contracting public utility social service tasks;
   - improving the effectiveness of co-operation between public entities and non-governmental organisations in the performance of tasks.
3. Development of the social economy institution.

The final priority is related to the governance structure and is called mobilisation and partnership. It covers two activities related to programming and implementation of policies:

1. Programming of social inclusion policy, through:
   - coordination of programming of the social policy with programming of the development policy;
   - nationalisation of the process of social inclusion programming;
   - annual programmes for the co-operation between local government units and nongovernmental organisations;
   - educational activities regarding the development of the programming process;
   - development of a consistent monitoring and evaluation system.
2. Integration and development of social services
   - development of the potential of social services;
   - improvement of the quality of social services;
   - coordination of activities of labour market and social welfare institutions.

In order to monitor the implementation of the National Action Plan, a monitoring table was prepared. For each of the priorities, monitoring indicators are formulated on the priority level as well as on action levels. Each of the indicators can be measured and sources of information for the monitoring of the indicators are identified. NAP/Inclusion does not include specific targets for the indicators, that are planned to be developed in the process of monitoring. It is planned to perform regular monitoring of the implementation of actions set forth in the National Action Plan, in order to avoid difficulties encountered in years 2004–2006.

It should be noted that priorities specified in the Polish NAP/Inclusion are shared also by other member states. This is particularly true of the need to develop more integrated family policy as well as supporting integration of those furthest away from the labour market. This shows that there is a role for the OMC to share experiences and best practices in these areas of social policy in order to achieve the common objectives for the EU.

Concluding this article, a few observations can be made on the impact of the National Action Plans in the social integration policy. First important impact is the medium-term planning of the social policy in the form of national plans that are subject to social consultation. This allows for greater transparency of the process as well as allows for better integration of policies implemented on national, regional and local levels.

Second important value added of the process is strengthening the role of indicators in monitoring and development of policies. The developed indicators allow for better assessment of implemented policies as well as for formulating directions of further changes.

Finally, the preparation of the NAP/Inclusion allows for better planning and use of the resources used for social integration, not only from the state and local governments budgets, but also from the European Social Fund.

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PROPOSAL FOR CONSTRUCTION OF A MEASURE OF CUMULATIVE POVERTY INITIAL REMARKS

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Most recent years saw enormous progress in terms of measurement and analysis of poverty. Usually, analysis of poverty is limited to its income-related aspect, including in particular, the monetary one. However, more and more often steps have been taken in order to measure and examine many other dimensions of poverty (World Bank 2003). For example, human poverty index (HPI)\(^1\) developed by UNDP serves this purpose, as well as adoption by the EU countries of a set of jointly developed and agreed social indices\(^2\) covering four most important areas concerning social poverty and exclusion\(^3\), namely: income, employment, health and education (Task Group for Social Reintegration MGPiPS 2004). Complexity of the phenomenon of poverty is explained by description of situation of people or groups excluded from one or more than one dimension of social life, including not only job, education, culture, health protection, but also administration of justice and social security. Authors dealing with those problems most generally state that exclusion means not only deprivation of access to the aforementioned spheres of life, but it also may mean access of worse quality\(^4\). Currently, they work on expansion of the list by new indicators (tertiary indicators)\(^5\) acknowledging the aspects of poverty that are not related to income.

A method taking into account multi-dimensional concept of poverty is an aggregation of various dimensions into one index. This article shows that an alternative for application of single measures of poverty may be a synthetic measure constructed on the basis of information concerning various aspects of poverty – income, housing conditions, health, and education.

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1. HPI
2. Tertiary indicators
3. Poverty
4. Multidimensional
5. Tertiary indicators
RANGE OF POVERTY

Although it is known that a single measure – income, or expenses, cannot properly measure such a multidimensional, complex phenomenon like poverty, yet, when it comes to quantitative analysis of poverty, it is usually limited to its income-related aspect, including in particular the monetary one. The income poverty includes both synthetic and specific measures (Kordos 1991). Three of them are generally applied and are most universal: the headcount index, the poverty gap index, and the poverty severity index (World Bank 2004).

The extent of the headcount index and its distribution in 2003 among household groups distinguished in terms of source of income and selected social-and-demographic characteristics are shown in the second column of Table 2. The poverty determinants are unevenly distributed for years (Radziukiewicz 2006a, 2006b):

- groups most exposed to poverty are households supporting themselves from non-earning sources (49.7%) and farmers (40.9%), while those least exposed to poverty include (save for retirees; only 6.5% of households are poor in that group) the self-employed and employee households. In other household groups: pensioners and employee-farmers, nearly 20% of households are poor;
- the number of individuals and individual composition of a household rank among the main factors determining the material life standard of a household. Greater number of children in a family is the main determinant of unfavorable material situation of the household, which means that families with many children are most handicapped in terms of poverty. In 2003, more than 46% of families with 3 or more children fell within the poverty area. Nearly one half of families having four or more children had a monthly income equivalent smaller than or at least equal to PLN 529.5;
- the poverty sphere grows along with the number of people in a family;
- the income equivalent falling below the poverty line was attributable to 26.5% of rural households. The smaller a town, the greater poor household percentage. Namely, households falling below the poverty line include a small group of big city households (barely 5.8%), 13.7% of households coming from towns with population of 20–100 thousand, and nearly 17% of small-town households (population smaller than 20 thousand);
- poverty has the greatest range (more than 24%) among households with the lowest education status – base vocational, and primary, or gymnasium;
- the greatest percentage of poor households is definitely among households where the head of the family is 35–44 years old. Also, young (the head of the family aged 24, or less) households have large percentage in the sphere of poverty. Participation of poor households in the total number of households drops after an age of the head of the family passes the threshold of 44;
- the poverty range in the "blue-collar" households was more than 5 times higher than in the "white-collar" ones.

THE POVERTY SYMPTOMS

Poverty in our country has different character and is not only limited to a single element, which is a low income.

Studies (Beskid 1995) show that a poverty factor which comes second to income consists of the accommodation conditions. The accommodation conditions are mainly determined by the fact of having/owning a house or a flat and an equipment. The standard and comfort of accommodation mainly depends on how it is equipped with the technical and sanitary appliances. Therefore, it seems that an important information on the "housing poverty" will be an information about households inhabiting premises devoid of a bathroom, i.e. premises of a lowest standard. With much simplification it may be assumed that premises without a bathroom are also within old housing resources: in buildings built before the last war or in early post-war years.

Without any doubt, the accommodation conditions are determined by a total usable area of a flat, or, speaking more precisely a "density", i.e. a residential area per person. Households with an area per person not greater than 10 m<sup>2</sup> fall within the poverty range.

Another aspect of the accommodation situation was not omitted, which does not affect the usable value of a flat, but rather provides certain psychical discomfort (or comfort) to the users thereof, which namely is a character of tenancy. Let us remind you that it was assumed that determination of the poverty sphere is largely conventional and arbitrary, namely, that poor families inhabit social flats or premises with regulated rent.

While considering each of the above "housing poverty" elements individually, one should arrive at a conclusion that they are very dispersed. With the accommodation poverty limits being set at such a low level, different number of households fall within its area depending on a criterion. Nearly 15.5% of households live in cheap premises (inhabit social flats or rent flats with regulated rent), nearly 11% of households has overcrowded flats (with no more than 10 m<sup>2</sup> of usable area per person), and 8.3% of households have to do without basic elements of comfort, such as a bathroom.

The "housing poverty" does not fully depend on the income poverty. Nearly 21% of poor households (i.e. those falling below the income-related poverty line) lived in difficult housing conditions due to an amount of usable area per person in a household. Nearly 25% of poor households was deprived of a bathroom, and nearly 22% inhabited the cheapest premises. Coexistence of all the elements of the housing poverty together with the income poverty only applied to 3.1% of households. As much as 50.3% of households fall below the income-related poverty line, but stay out of the housing poverty range (considering all the elements thereof).

In order to distinguish poor households, one would also need knowledge on property already accumulated in households. The living level does not only depend on an amount of income generated but also on tangible and financial property of a household. Therefore, to consider durable goods that a household is equipped with in addition to income and housing conditions would certainly underscore differences in affluence of different social-and-economic groups. The statistical material available includes information about outfitting of households with 32 objects of durable use<sup>7</sup>. Nowadays, a PC with access to Internet should be classified as widely available goods the lack of which in a household should be deemed as a poverty index.

Percentage of households without a PC or access to Internet also reflects the education poverty.

In addition to income, bad housing conditions, or education, another one is poverty is health. Even without looking into the matter very deeply, one may spot situations in which illness or other fortuitous event (disability) causes a family affected therewith to become poor. Percentage of households facing the problem of disability (including a person pronounced disable) reflects the health poverty.

In summary, it is worthwhile drawing your attention to yet another aspect of income-related situation of households. Comparison of "usuable" income and spending of individual households shows that a significant number of them spend more than an amount of their current income. In 2003, the situation pertained to 39.6% of households. The structure of the share of households with spending exceeding income is shown in the data on Table 1.
In the social-and-economic groups the said share was structured as follows: for employee households – 35.7%, for households of employees usufructing agricultural farm – 38.5%, for farmers’ households – 50.3%, for sole traders’ households – 40%, for pensioners’ households – 39%, for households of pensioners due to disability – 45.1%, for households of those supporting themselves from non-earning sources – 49.9%. It follows then that even for the households of sole traders who are relatively well-off, in 40% of them expenses exceed incomes. The situation where spending exceeded income was more frequent with households of families with three children. In comparison with other households, spending much greater than permitted by income also occurred with households of single people, households of rural areas, households of people with primary education, and those where the head of the family was aged 45–74.

On the other hand, when considering the above-mentioned shares with households below the poverty line (60% of value of the total household median), spending exceeded income with as much as 58.6% of households. As reflected in the data of Table 2, such situation occurred mainly with poor farmer households (77.4%) and with more than 60% of the following households: sole traders, pensioners, and those supporting themselves from non-earning sources, childless couples, couples with one child, lone parents, families composed of 1, 2 and 3 people, those inhabiting cities with population in excess of 200 thousand, where the head of the family had higher or secondary education status, was aged 45–74.

Table 1. Households in accordance with selected characteristics in 2003

<table>
<thead>
<tr>
<th>Households</th>
<th>Below the subjective poverty line</th>
<th>Without bathroom</th>
<th>Minimum area</th>
<th>Cheap premises</th>
<th>At least with one of symptoms</th>
<th>With income &lt; expenditures</th>
<th>Without a computer or Internet</th>
<th>Including a person prononounced as disabled</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>15.61</td>
<td>10.77</td>
<td>8.27</td>
<td>15.49</td>
<td>27.64</td>
<td>39.64</td>
<td>71.18</td>
<td>14.00</td>
</tr>
</tbody>
</table>

Households of:

- Employees: 12.36
- Employees -farmers: 20.79
- Farmers: 38.68
- Self-employed: 12.56
- Retirees: 5.76
- Pensioners: 20.29
- Maintained from non-earned sources: 47.46

Type of the biological family:

- Childless couple: 5.07
- with 1 child: 14.18
- with 2 children: 22.20
- with 3 children: 37.79
- with 4 and more children: 59.27
- Single parents with children: 30.83
- Others: 13.11

Number of person in the household:

- 1: 6.73
- 2: 8.88
- 3: 14.07
- 4: 19.79
- 5: 29.50
- 6 and more: 34.44

Type and size of locality:

- Cities with inhabitants >=500 thousand: 5.79
- 200–500 thousand: 9.89
- 100–200 thousand: 11.53
- 20–100 thousand: 12.62
- Below 20 thousand: 16.02
- Rural areas: 24.68

Education:

- Higher: 2.28
- Secondary: 8.65
- Base vocational: 23.19
- Primary: 22.91

Age of the head of household:

- 24 or younger: 20.48
- 25–34: 18.87
- 35–44: 22.31
- 45–54: 17.56
- 55–64: 11.18
- 65–74: 7.03
- 75 or older: 6.12

Position of the head of household:

- Blue collar: 20.17
- White collar: 3.86

Source: Author’s own study on the basis of household budgets.

In the social-and-economic groups the said share was structured as follows: for employee households – 35.7%, for households of employees usufructing agricultural farm – 38.5%, for farmers’ households – 50.3%, for sole traders’ households – 40%, for pensioners’ households – 39%, for households of pensioners due to disability – 45.1%, for households of those supporting themselves from non-earning sources – 49.9%. It follows then that even for the households of sole traders who are relatively well-off, in 40% of them expenses exceed incomes. The situation where spending exceeded income was more frequent with households of families with three children. In comparison with other households, spending much greater than permitted by income also occurred with households of single people, households of rural areas, households of people with primary education, and those where the head of the family was aged 45–74.

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In accordance with the data included in table 2, such situation occurred mainly in poor farmer households (77.4%) and more than 60% of the following households: sole traders, pensioners, and those supporting themselves from non-earning sources, childless couples, couples with one child, lone parents, families composed of 1, 2 and 3 people, those inhabiting cities with population in excess of 200 thousand, where the head of the family had higher or secondary education status, was aged between 45–64, and occupied white-collar work position.

The poverty symptoms distinguished are largely independent from each other and, various household groups are exposed to poverty depending on the poverty symptom being considered. It is obvious, that a family may have low income, even though they have a PC or good housing conditions. It appears that income poverty comes together with at least one form of housing poverty in the case of 40.7% of households. In majority of them: 85.4% households, income poverty coexists with lack of PC or access to Internet, and in ca. 17.6%, it pertains to both income and disability. Simultaneous presence of all the poverty symptoms: income poverty (IP), housing (HP), educational (EP) and health-related (HRP) was reported with barely 1.5% of all the households.

Therefore, what are the factors that are conducive to accumulation of various poverty symptoms?

**CUMULATIVE POVERTY MEASURE**

Considering the multi-dimensional character of poverty, first of all a synthetic poverty measure was constructed using the following formula: 

$$SPM = IP + HP + EP + HRP$$

If the given poverty symptom has appeared in a household, then an appropriate fractional factor adopts the value of 1, or the value of 0 in absence of the given symptom. For households affected with each of the poverty symptoms, the poverty measure has the value of 4, or 0 for households with no poverty symptom. The foregoing measure, being a total of fractional measures, informs us which household is "poorer". Therefore, if one household has a higher value of the SPM poverty measure than the other one, it means that it is poorer than the other household.

Let us draw your attention to the fact that in this way every household has a specific value of the poverty measure allocated to it. In 62.4% of households either one or no poverty symptom
appeared, in 26% of households 2 symptoms appeared, and in 10.1% 3 symptoms appeared. As we have already stated above, accumulation of poverty pertained to 1.5% of all the households. It is extremely difficult to objectively determine what value of the poverty index should be assumed as the threshold value, below which the given household should be deemed as poor. Every solution would be subjective, and the results obtained would have an approximate character. The poverty index value equal to 2 was arbitrarily adopted as the threshold of threatening poverty; it is worthwhile mentioning that the latter determination qualifies 11.5% of households as poor. For the purpose of comparison between the income poverty and multidimensional poverty, as well as for the purpose of identification of factors conducive to poverty, such solution seems to be sufficient.

Table 2. Cumulating of poverty in households in 2003

<table>
<thead>
<tr>
<th>Households</th>
<th>Households percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Below the subjective poverty line</td>
<td>Without a computer or Internet</td>
</tr>
<tr>
<td>With symptoms of housing poverty</td>
<td>Including a person pronounced as disabled</td>
</tr>
<tr>
<td>With income &lt; expenditures</td>
<td></td>
</tr>
<tr>
<td>Without</td>
<td></td>
</tr>
<tr>
<td></td>
<td>16.82</td>
</tr>
</tbody>
</table>

Households of:

<table>
<thead>
<tr>
<th>Type of the biological family:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Childless couple</td>
<td>5.59</td>
</tr>
<tr>
<td>with 1 child</td>
<td>15.20</td>
</tr>
<tr>
<td>with 2 children</td>
<td>23.98</td>
</tr>
<tr>
<td>with 3 children</td>
<td>40.39</td>
</tr>
<tr>
<td>with 4 and more children</td>
<td>61.10</td>
</tr>
<tr>
<td>Single parents with children</td>
<td>32.88</td>
</tr>
<tr>
<td>Others</td>
<td>49.69</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Number of person in the household:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>7.72</td>
</tr>
<tr>
<td>2</td>
<td>9.61</td>
</tr>
<tr>
<td>3</td>
<td>15.07</td>
</tr>
<tr>
<td>4</td>
<td>21.44</td>
</tr>
<tr>
<td>5</td>
<td>31.51</td>
</tr>
<tr>
<td>6 and more</td>
<td>36.21</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Type and size of locality:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Cities with inhabitants &gt;=500 thousand</td>
<td>6.40</td>
</tr>
<tr>
<td>200–500 thousand</td>
<td>10.61</td>
</tr>
<tr>
<td>100–200 thousand</td>
<td>12.64</td>
</tr>
<tr>
<td>20–100 thousand</td>
<td>13.71</td>
</tr>
<tr>
<td>Below 20 thousand</td>
<td>16.99</td>
</tr>
<tr>
<td>Rural areas</td>
<td>26.51</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Education:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Higher</td>
<td>2.44</td>
</tr>
<tr>
<td>Secondary</td>
<td>9.55</td>
</tr>
<tr>
<td>Base vocational</td>
<td>24.96</td>
</tr>
<tr>
<td>Primary</td>
<td>24.54</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Age of the head of household:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>24 or younger</td>
<td>21.85</td>
</tr>
<tr>
<td>25–34</td>
<td>20.07</td>
</tr>
<tr>
<td>35–44</td>
<td>23.79</td>
</tr>
<tr>
<td>45–54</td>
<td>18.96</td>
</tr>
<tr>
<td>55–64</td>
<td>12.07</td>
</tr>
<tr>
<td>65–74</td>
<td>8.20</td>
</tr>
<tr>
<td>75 or older</td>
<td>6.60</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Position of the head of household:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Blue collar</td>
<td>21.95</td>
</tr>
<tr>
<td>White collar</td>
<td>4.20</td>
</tr>
</tbody>
</table>

Source: Author’s own study on the basis of the household budgets.

RESULTS OF LOGIT ANALYSIS

In order to set apart influence of each factor, a logit model was developed. Let us remind you that the explained variable adopted the value of 1, when a household was in the sphere of poverty (in our case, when the value SPM ≥ 2), or 0 when it was outside of that sphere. Accordingly, also the explaining variables appearing in the model were defined as zero-one variables. The results of the evaluated logit function are presented in Table 3.

Households that are relatively more frequently exposed to poverty, or accumulation of various poverty symptoms, are those of pensioners due to disability, composed of many members: 5,
or 6, or more people, many children: 3, 4 or more. Households where the head of the family has a vocational or primary education background, and is aged between 25–34 are exposed to greater poverty. An effect of the place of residence of the household members on the range of all form of poverty turned out to be ineffective, even though households located in the southern and north-western regions are definitely exposed to smaller poverty than those of the eastern macro-region.

CONCLUSIONS

The evaluated parameters of the logit model confirm importance and material influence of the previously selected factors on the fact of coming within the range of accumulated poverty. Certainly, the assumptions adopted do influence the results presented. Even though the presented solutions are somewhat arbitrary and/or imperfect (for example, the form of the "multi-dimensional" poverty index is too simplified), conclusions drawn from the hitherto studies on poverty become reinforced and confirmed.

Table 3. The logit regression model explaining exposure to poverty

<table>
<thead>
<tr>
<th>Explaining variables</th>
<th>Model (1)</th>
<th>t-Student’s Statistics</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Constant</strong></td>
<td>-1.6060</td>
<td>-9.068</td>
</tr>
<tr>
<td><strong>Social-and-occupational group:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employees</td>
<td>-1.6962</td>
<td>-24.159</td>
</tr>
<tr>
<td>Employees-farmers</td>
<td>-2.086</td>
<td>-19.118</td>
</tr>
<tr>
<td>Farmers</td>
<td>-1.5407</td>
<td>-13.898</td>
</tr>
<tr>
<td>Self-employed</td>
<td>-1.9840</td>
<td>-15.943</td>
</tr>
<tr>
<td>Retirees</td>
<td>-1.0268</td>
<td>-11.409</td>
</tr>
<tr>
<td>Pensioners</td>
<td>0.5395</td>
<td>7.595</td>
</tr>
<tr>
<td>Maintained from non-earned sources</td>
<td>ref.</td>
<td>ref.</td>
</tr>
<tr>
<td><strong>Biological family type:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Childless couple</td>
<td>-0.9027</td>
<td>-6.815</td>
</tr>
<tr>
<td>Couple with 1 child</td>
<td>-0.4330</td>
<td>-3.400</td>
</tr>
<tr>
<td>with 2 children</td>
<td>ref.</td>
<td>ref.</td>
</tr>
<tr>
<td>with 3 children</td>
<td>0.3494</td>
<td>2.389</td>
</tr>
<tr>
<td>with 4 or more children</td>
<td>0.7218</td>
<td>4.719</td>
</tr>
<tr>
<td>Single parents with children</td>
<td>0.0076**</td>
<td>0.059***</td>
</tr>
<tr>
<td>Others</td>
<td>-0.5785</td>
<td>-5.763</td>
</tr>
<tr>
<td><strong>Number of household members:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>0.0392</td>
<td>0.490**</td>
</tr>
<tr>
<td>2</td>
<td>0.1612</td>
<td>1.728**</td>
</tr>
<tr>
<td>3</td>
<td>ref.</td>
<td>ref.</td>
</tr>
<tr>
<td>4</td>
<td>0.0515</td>
<td>0.544**</td>
</tr>
<tr>
<td>5</td>
<td>0.3961</td>
<td>3.715</td>
</tr>
<tr>
<td>6 or more</td>
<td>0.7835</td>
<td>7.756</td>
</tr>
<tr>
<td><strong>Locality type and size:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Towns/Cities</td>
<td>-0.0634</td>
<td>-1.448**</td>
</tr>
<tr>
<td>Rural areas</td>
<td>ref.</td>
<td>ref.</td>
</tr>
<tr>
<td><strong>Educational background of the head of household:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Higher</td>
<td>-1.2928</td>
<td>-7.389</td>
</tr>
<tr>
<td>Secondary</td>
<td>ref.</td>
<td>ref.</td>
</tr>
<tr>
<td>Base vocational</td>
<td>1.0594</td>
<td>18.240</td>
</tr>
<tr>
<td>Primary</td>
<td>1.7016</td>
<td>27.444</td>
</tr>
<tr>
<td><strong>Age of the head of household:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>24 years and/or younger</td>
<td>0.1072</td>
<td>0.904</td>
</tr>
<tr>
<td>25–34</td>
<td>0.3610</td>
<td>5.060</td>
</tr>
<tr>
<td>35–44</td>
<td>0.0231</td>
<td>0.338</td>
</tr>
<tr>
<td>45–54</td>
<td>ref.</td>
<td>ref.</td>
</tr>
<tr>
<td>55–64</td>
<td>-0.4507</td>
<td>-6.314</td>
</tr>
<tr>
<td>65–74</td>
<td>-0.7140</td>
<td>-8.370</td>
</tr>
<tr>
<td>75 years and/or older</td>
<td>-0.6892</td>
<td>-7.264</td>
</tr>
<tr>
<td><strong>Macro-region:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Central</td>
<td>0.0107</td>
<td>0.135**</td>
</tr>
<tr>
<td>Southern</td>
<td>-0.1751</td>
<td>-2.463</td>
</tr>
<tr>
<td>Eastern</td>
<td>ref.</td>
<td>ref.</td>
</tr>
<tr>
<td>North-Western</td>
<td>-0.2010</td>
<td>-2.652</td>
</tr>
<tr>
<td>South-Western</td>
<td>0.1220</td>
<td>1.531**</td>
</tr>
<tr>
<td>Northern</td>
<td>-0.0290</td>
<td>-0.359</td>
</tr>
</tbody>
</table>

ref. – variable constituting a point of reference in a logit model;
n.s. – value of the t-Student’s statistics that is lower than 2 means unimportance of the explaining variable in the model;
Source: Author’s own calculations on the basis of BGD 2003.

(HPI-2). Both indices include information on three dimensions of quality of life: long and healthy life, knowledge, decent standard of living. Additionally, the HPI-2 index acknowledges yet one more aspect of living — social exclusion. The synthetic measure of the social poverty level: HPI, for Poland and 16 regions (voivodships) is presented in the author’s article: Przestrzenne zróżnicowanie ubóstwa społecznego, in: "Handel Wewnętrzny" No. 2, 2006.

1 On the summit in Laeken in December 2001, they adopted 18 statistical indices in the scope of income, poverty and social exclusion.

2 Latin: exlusio – exclusion, rejection.

3 Pursuant to the foregoing, a situation rendering it impossible or considerably hindering an individual or a group lawful performance of his/her/their social roles, use of public interests and social infrastructure, accumulation of resources or generation of income in a respectable manner is defined as social exclusion.

**Table 3. The logit regression model explaining exposure to poverty**
MODIFICATION OF THE SOCIAL MINIMUM AND SUBSISTENCE MINIMUM BASKETS

Lucyna Deniszczuk
Expert, Warsaw

Piotr Kurowski
Marta Styrc
Institute of Labour and Social Studies, Warsaw

INTRODUCTION

In research on poverty and social exclusion in Poland, there are four categories of minimum consumption that are determined through a basic needs method. The oldest of them is the social minimum, which has been present in the social statistics since early 80-ties, and subsistence minimum, which has been calculated since mid 90-ties. Development of the subsistence minimum basket, along with general verification of the social minimum, was performed as a part of the "Polish Poverty" project (Deniszczuk, Sajkiewicz 1997a; 1997b). Since then, only negligible adjustments were made to the composition of the basket resulting from on-going necessities. In 1997–2005, values of the subsistence minimum and social minimum baskets were periodically indexed through recalculation thereof on the basis of average prices of the Central Statistical Office.

In the ten years since determination of commodity structure of the social and subsistence minimum baskets, changes have occurred within the scope of expert recommendations, structure of supply of goods and services, and consumers' behavior. These changes justify the need for reviewing and updating the content of the baskets. The study is aimed at modifying the content of the social and subsistence minimum baskets of goods and services, which are two categories that are of importance for analysis of poverty and social exclusion in Poland.

The first part of the study covers theoretical and methodological aspects, first of all the basic needs method (also called a basket method), its genesis, application, advantages and disadvantages.

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Szułkowiak J. (2006), W stronę wielowymiarowej analizy ubóstwa i społecznego wykluczenia [Towards Multidimensional Analysis of Poverty and Social Exclusion], „Wiadomości Statystyczne” No. 5.


World Bank (2004), Measures of Poverty.
In the second part, Polish contribution was presented to the application of the basic needs method for determination of various poverty lines, as well as other methods of determination thereof.

In the third and fourth part of the study, which also form its main axis, results of research are presented, as well as changes to the social and subsistence minimum baskets. In an analysis of specific need groups (food, accommodation, clothes, education, health protection, personal hygiene, transport and communication, culture and recreation) the following was presented: current status of knowledge of methods of how to satisfy them, scientific guidelines and the final solutions applied. The last part of the study is a summarization.

THE BASIC NEED DETERMINATION METHOD

In research on measurement of poverty (including an absolute one) or social exclusion, one of methodical approaches is determination of a border of those phenomena through a basic needs method, which is also called a basket method. The basket method is designed to construct of a model (formula) of satisfaction of needs (in accordance with the given standard) for selected household types. The model has a form of a basket of goods and services (quantitative and/or of value). The contents of the baskets are determined on the basis of scientific guidelines and recommendations of experts dealing with human needs, and on the basis of analysis of the goods and services market, including the price level and structures, and analysis of consumers’ behavior. On the basis of the formula developed, one may determine income enabling purchase of goods satisfying basic needs of an individual and/or household.

Base for the construction of the model is current knowledge of access to goods and services (supply) and knowledge of current consumption behaviors and their trends (demand). The sources of this knowledge are results of statistical research on household spending and other research.

At the turn of 20th century, the basket method was applied for determination of minimum consumption of blue-collar families in London (Rowntree 1901). The beginnings of application of that approach in Poland date back to 20-ties of the 20th century, when they estimated movements in the minimum costs of living of families (see: Luszniwicz 1959). After World War II, in late 50-ties, attempts were made at author’s research on minimum consumption. In mid 60-ties, they developed a so-called minimum costs of living of blue-collar families, the results of which (which, at that time, were only known to the authorities and the trade union governing bodies) served attempts to increase the lowest wages (Deniszczuk 2005)1. Since 1981, as a result of implementation of one of the postulations of the August Agreements (see: Golinarska 2001), the social minimum category played an important role as a measure of costs of living of families. In mid 90-ties a new category: the subsistence minimum basket, came into being on the basis of the basket method. In 2002, new categories were developed: Social Intervention Threshold, and Family Income Support.

THE MINIMUM CONSUMPTION THRESHOLDS APPLIED IN POLAND

Currently, four critical categories function in Poland; they have been developed using the basket method and used for research on poverty and social inclusion.

Social Minimum (SM). According to that standard, the extent and level of needs satisfied should ensure such living conditions so as to enable a human being, in every phase of biological development, reproduction of his vital forces, having and upbringing of offspring, and maintenance of social ties in the work, learning, and leisure processes (Deniszczuk 1977). To respect the criterion of maintenance of ties with the society means that the social minimum basket not only provides for satisfaction of elementary needs necessary to survive, but also social needs and certain needs of higher order. Satisfaction of the latter needs is determined at a level relatively low yet acknowledging scientific recommendations (nourishment, personal hygiene, accommodation), conforming to publicly recognized social (dress) and cultural (recreation, culture) norms, as well as applicable legal regulations (education, health protection).

Satisfaction of needs at a level and within a structure corresponding to the social minimum does not mean poverty, but sufficient, albeit modest, living conditions adequate to average level of living in the given country. Such living conditions prevent social exclusion of an individual and his/her family for economic reasons. However, satisfaction of needs at a lower level may lead to the breaking off of social ties. Therefore, the social minimum needs to be recognized as a social integration, or, negatively, a social exclusion index.

The subsistence minimum, which is also called a biological minimum, determines a level of satisfaction of needs below which biological threat of life as well as psychical and physical development of a human and/or his family occur. The basket acknowledges spending on goods and services enabling only so-called survival, such groups of needs like recreation, transport, and communication or participation in culture are not taken into account. As a consequence, the subsistence minimum is regarded as a lower level of the area of poverty (Deniszczuk, Sąjkiewicz 1997a).

Social Intervention Threshold (SIT) determines limits of income of an individual or a household entitling to take advantage of welfare benefits. Therefore, this category may be regarded as an official borderline of poverty (IPISS 2002a, p. 8). The SIT basket guarantees satisfaction of needs requisite for living to a very modest extent. The basket was first evaluated in 2002. Pursuant to legal regulations (Law on Welfare, Art. 9), the said threshold is regularly verified by the experts of the Institute of Labor and Social Studies (IPISS) (every 3 years).

Family Income Support (FIS) determines limits of income entitling to receive family benefits, which are instruments of family policy. The primary goal of the family policy is to support families in their recreation and upbringing functions (IPISS 2002b, p. 5). Therefore, the FIS threshold is higher than the basket entitling to welfare benefits. Like in the case of the SIT basket, the rules of application of the said category have been statutorily regulated (see: the Law on Family Allowances, Art. 18).

Statutory powers of the last two categories (SIT and FIS) means that they are official instruments of social policy.

MODIFICATION OF THE SOCIAL MINIMUM BASKETS

When modifying the material structure of the social minimum baskets they were driven by the basic criterion resulting from the above-quoted definition of the said category.

Food

A basis for modification of the food basket were current recommendations of physiologists envisaged in the Polish Nutrition Norms (Ziemiański 2001) that constitute a basis for development of model nourishing rations by the experts of the National Food and Nutrition Institute (see: Turlejska et al. 2004 and Dzieniszewski et al. 2001).

It was assumed that an individual running a household can take advantage of information on wholesome and rational nourishment, and compose nourishing rations so as to minimize their costs2. On the basis of outcomes of research and/or pools (Piskiewicz, Szopectieniec-Puchalska 2005; CBOS 2004a; Pentor 2006; TNS OBP, 2002, p. 4) the consumption model assumes that low income employee households chose the cheapest shopping sources and
take advantage of promotional campaigns and sales. Due to their limited mobility, pensioner households can take advantage of the cheaper shopping sources to a smaller extent; their food basket is relatively more expensive than that of employee households.

**Accommodation**

When taking into account the existing structure of flats occupied, as a standard type of accommodation in the social minimum basket a flat in a housing cooperative was chosen. The costs of such a flat is generally lower than that of a flat in the communal resources. Based on information about the current housing situation of employee households, it was assumed that an area of flats occupied ranges from 25 m² (a single-person household) to 70 m² (household composed of 6 people).

The costs of use of a flat and consumption (“norms”) of carriers of energy and water were determined on the basis of results of pools of the Central Statistical Office (GUS) and the Institute for Urban Development (IRM) (GUS 2003a, 2003b; IRM 2005). Taking into account an area of the flats occupied, the number and age of household members, we built a quantitative resource of outfitting of flats with requisite equipment (including in particular those serving preparation and consumption of meals, rest, storage of clothes, pots, cleaning agents) (see, for example, Piskiewicz 2005). The needs of children and youth in the school age (for example equipment enabling learning at home) were also taken into account.

**Education, culture and recreation**

In the modified basket of educational needs the phenomenon of dynamic development thereof as well as the effects of the reform of educational system were taken into account. It was assumed that children and youth attend schools in accordance with their statutory obligation, and, in the childless households, both adults participate in training programs. Requisite expenses for school equipment, textbooks, notebooks, exercise books, discs and other outfitting were taken into account, as well as charges for the parent-teacher association, insurance, and participation in school events.

In the modified basket of cultural needs the model household has a PC (acquired second hand); and, additionally, provided for modest expenses on books, cinema and/or theatre. As regards recreation, expenses of two-week annual vacation at the lowest costs for the whole family were taken into account.

**Clothes and shoes**

When modifying the clothes-and-shoes basket, current results of market research were used, (Pentor RI 2005; CBOS 2005b). The assumed resources of clothes and shoes of households should enable participation in various forms of activity (work, learning, recreation and maintenance of contacts). In the modified basket, resources of clothes and shoes were adjusted to the seasonal changes and various circumstances. Long periods of use were determined, approximating physical wear of clothes and shoes, however, to varying extent. Periods for clothes of children and youth were set shorter, acknowledging the fact of fast physical development and the “growing out” of clothes due to that fact. When evaluating the basket, the results of current pools were taken into consideration – they indicate that clothes, especially non-quality and/or branded ones, are primarily purchased at small trading places (bazaars) or in the second hand stores.

**Transport and communication**

When modifying the basket of needs related to transport it was took into account the fact that more and more often, there is a car in a household, and, as regards the communication basket, the effects of dynamic development of cellular telephony and Internet (GUS 2005b, p. 31). We assumed that employee families with children have a car (bought second hand), which is to serve them for no longer than 6 years (TNS OBOP 2006a). In particular, the car is used in order to take children to school or doctor, to do shopping (e.g. at a supermarket), or to take the entire family for summer vacations. Ownership of a car by single people or childless couples was not taken into account, but we provided for an appropriate number of city buss rides for them, as well as travels by train to summer vacations.

It was assumed that employee families with children have regular telephone, and the head of the family uses a cheap cellular prepaid card phone. Pensioner households, were provided only with a regular phone. It is assumed that most people have access to Internet at places different than home (working people at their workplace, children in the gymnasium age at school) (see: the Social Monitoring Council 2005c, p. 251). Even though we provided for computer at home, yet without the regular link. Modest scope of use of internet café was provided for the head of the family and a learning child, as the representatives of those needs.

**Health protection and hygiene**

In the modified health protection basket we acknowledged the effects of changes in the health care system consisting of limitation of availability of public medical services and reduced scale of additional payments to drugs out of funds of the National Health Fund. It was assumed that a household purchases drugs against most typical complaints (for example, cold, pains, indigestion), as well as ailments affecting people in the final phase of occupational activity and post-production age. Drugs and pharmaceutical materials were partially attributed to a household as a whole (comprising a “household medicine cabinet”), and partially to individual people. Paid medical services including visits at the doctor’s (of children only) and visits at the dentist’s (more often for children than for adults) were included in the basket for the first time.

In the personal hygiene basket, use of hygienic agents was assumed at a level enabling good maintenance of cleanliness (in particular, deodorants were introduced into the basket). Concurrently, it is assumed that purchases of means of hygiene can be planned so as to take advantage of periodic promotions offered by supermarkets, thus minimizing expenses.

**Other expenses**

Households also spend sums on goods and services not specified in the above-presented baskets, or have certain amounts at their disposal, which, in research on their budget was specified as “pocket money”. Therefore, like in the previous version of the social minimum, an appropriate “reserve” was provided for needs that are hard to be foreseen and generally related to fortuitous events. The reserve constitutes a portion of total value of expenses, and, depending on a household’s size, ranges from 8% in households composed of one person to 4% in households composed of 5 people.

**SUMMARY – MODIFIED SOCIAL MINIMUM**

Collective results of modification of social minimum for different types of employee and pensioner households are presented below.

The value of modified social minimum per person in a household composed of four people is nearly the same as the value of spending with moderately well off (of the 3rd quintile group) employee households in 2004 (with certain structural differences).
When modifying the subsistence minimum basket, we were driven by the base criterion following from a definition of that category and acknowledged current recommendations of experts, as well as the results of current market research and consumer behavior.

In the subsistence minimum basket, food accounts for a dominant portion of expenses, with the means of maintenance of cleanliness coming second, as well as most requisite expenses related to implementation of children’s and youth school attendance duty, and expenses related to maintenance of a very small flat, which corresponds to an assumption that defense against hunger and negative effects of natural environment determines the level of satisfaction of needs at the lowest admissible consumption standard.

Food

Modified food basket was constructed on the basis of Polish nutrition norms, acknowledging the results of expertise made by scientists of the National Food and Nutrition Institute. According to the expertise, quantities of energy and nourishing components coming from food articles in the basket does not cover a so-called safety margin, therefore, it means the lowest admissible level of satisfaction of the nourishing needs. When evaluating the basket, we acknowledged research results indicating that households with low incomes buy cheap, non-processed food at supermarkets or bazaars and market places, or take advantage of promotions and sales.

Accommodation

When modifying the basket of the housing expenses, we acknowledged both the existing housing situation of poor households, and were driven by an assumption that maintenance and exploitation of a modest flat is a need that cannot be postponed due to a risk of more permanent exclusion\(^4\). The assumption that and exploitation of a modest flat is a need that cannot be postponed due to a risk of more permanent exclusion\(^4\). The assumption that maintenance and exploitation of a modest flat is a need that cannot be postponed due to a risk of more permanent exclusion\(^4\). The assumption that maintenance and exploitation of a modest flat is a need that cannot be postponed due to a risk of more permanent exclusion\(^4\). The assumption that maintenance and exploitation of a modest flat is a need that cannot be postponed due to a risk of more permanent exclusion\(^4\). The assumption that maintenance and exploitation of a modest flat is a need that cannot be postponed due to a risk of more permanent exclusion\(^4\). The assumption that maintenance and exploitation of a modest flat is a need that cannot be postponed due to a risk of more permanent exclusion\(^4\).

Due to small areas of the flats and low incomes of households, only the most requisite equipment with low quality standards were acknowledged in the outfitting resources of the flats. Poor households primarily receive the basic equipment from donations, but a portion of the outfitting may be purchased second hand.

Education

In the subsistence minimum standard, we only acknowledged expenses related to education of children and youth within the framework of the school attendance obligation. It is assumed that children attend public schools, and a household only bears compulsory charges (e.g. compulsory insurance, rather than voluntary payments for parent-teacher association). It was assumed that a child’s parents can take advantage of family-associated benefits that they are entitled to within the framework of welfare. On the other hand, a household bears expenses for requisite school equipment, such as notebooks, exercise books, discs, textbooks (used), gym kit(s), and shoes to wear inside the school.

Clothes and shoes

When modifying the basket, we acknowledged the results of pools (for example those of CBOS, IRWiK, Pentor) concerning behavior of households on the market of clothes and shoes, and results of research on the low income household budgets. It is assumed that the basic resources of clothes of adults come from donation (except for underwear and shoes). For children and youth, we provided for purchase of several pairs of trousers (due to the fact that they wear out fast) and shoes (due to demands of hygiene). The model households with low income more frequently do shopping at bazaars and/or second hand stores, or take advantage of promotional sales.

Protection of health and personal hygiene

Modified health protection basket provides for extended list of drugs acknowledging a set of medicaments that generally have low prices, both those available under doctor’s prescription, and partially refunded (e.g. antibiotics), or available over the counter, basing on their low prices. They assumed that members of low income households use medical services within the framework of public health insurance, while only the youngest children use paid dentist services (once in 2 years), or consultation of medical expert (also once in 2 years).

Basing on observation of behavior of households, in the personal hygiene basket we assumed that the households purchase the cheapest assortments of means of hygiene, including

<table>
<thead>
<tr>
<th>Table 1. Modified social minimum (monthly, in PLN, prices of 2004)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Itemization</strong></td>
</tr>
<tr>
<td>----------------</td>
</tr>
<tr>
<td>M+F+Y+OC</td>
</tr>
<tr>
<td>M+F+OC</td>
</tr>
<tr>
<td>M+F+YC</td>
</tr>
<tr>
<td>M+F+Y+2xOC</td>
</tr>
<tr>
<td>M+F+Y+C</td>
</tr>
<tr>
<td>M+F+Y+OC</td>
</tr>
<tr>
<td>M+F+Y+YC</td>
</tr>
<tr>
<td>M+F+Y+4xOC</td>
</tr>
<tr>
<td>Total per household</td>
</tr>
<tr>
<td>Total per person</td>
</tr>
</tbody>
</table>

Source: Author’s own calculations.
in particular those offered at promotional prices and/or cheap store chains.

Other expenses

In the modified subsistence minimum, an additional category (similarly like in the social minimum) of so-called other expenses was introduced. Since expenses for some certain needs were not included in the model (for example in the area of mobility, i.e. transport and communication), a reserve must be provided for unforeseen expenses that are necessary for survival (for example, urgent trip to doctor’s or hospital). The assumed level of this reserve account for ca. 5% of total expenses specified.

**SUMMARY – MODIFIED SUBSISTENCE MINIMUM**

Results of modification of the subsistence minimum for individual household types are presented below.

<table>
<thead>
<tr>
<th>Itemization</th>
<th>Employee households composed of:</th>
<th>Pensioner households</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1 person</td>
<td>2 people</td>
</tr>
<tr>
<td>Food</td>
<td>M+F/2</td>
<td>M+F</td>
</tr>
<tr>
<td>Accommodation</td>
<td>138.14</td>
<td>276.29</td>
</tr>
<tr>
<td>Exploitation</td>
<td>163.12</td>
<td>226.35</td>
</tr>
<tr>
<td>Outfitting</td>
<td>151.16</td>
<td>210.41</td>
</tr>
<tr>
<td>Education</td>
<td>11.95</td>
<td>15.94</td>
</tr>
<tr>
<td>Clothes and shoes</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Drugs</td>
<td>10.58</td>
<td>21.16</td>
</tr>
<tr>
<td>Hygiene</td>
<td>6.68</td>
<td>11.14</td>
</tr>
<tr>
<td>Other expenses</td>
<td>10.22</td>
<td>19.90</td>
</tr>
<tr>
<td>Total per household</td>
<td>16.44</td>
<td>27.74</td>
</tr>
<tr>
<td>Total per person</td>
<td>345.17</td>
<td>582.58</td>
</tr>
</tbody>
</table>

Note: The Legend like in Table 1.
Source: Author’s own calculations.

In the case of a household composed of 4 people in 2004, the value of modified subsistence minimum exceeds spending of employee households with the lowest income (I decile) by 8%. The said value was approximating the spending of employee households with income ranging from PLN 300 to 400 per person monthly. However, in accordance with the assumptions, the subsistence minimum does not acknowledge several groups of expenses (on alcohol and tobacco, recreation and culture, transport and communication, hotels and restaurants).

**CONCLUSIONS AND RECOMMENDATIONS**

The minimum consumption baskets have become an important criterion of assessment of material situation of households in Poland. Nowadays, the baskets still play an important role, both in research conducted on the range of poverty and social exclusion, debates on the social policy and the social policy practice. The said indices, in particular the social minimum basket, have become an important point of reference not only for experts, but also for the public.

Modification of the social minimum and subsistence minimum baskets has been carried out after nearly ten years. The period is too long due to the fact of change of market conditions, the level and relation of prices, incomes, and behaviors of households, as well as the rules of functioning of social services. Therefore, we propose that both categories be modified every three years (similarly like the SIT and FIS thresholds).

To modify the social minimum and subsistence minimum as frequently as proposed requires that the following be regularly monitored:

– Changes of consumption-related behavior of households (including in particular those with the lowest and/or low incomes) on the basis of results of research on household budgets and marketing research;

– Movements in the level and structure of household income and consumption;

– Movements in the market supply (also acknowledging technological progress);

– Average price movements according to quotations of the Central Statistical Office and their confrontations with the prices of the cheapest assortments offered at bazaars, markets, or supermarkets;

– As well as periodic analysis of the effects of the movements monitored for construction of material content of the baskets and their evaluation.

An important problem calling for solutions in the course of future research and modifications, especially of the social minimum, would be to acknowledge expenses related to satisfaction of the need to secure property and life. The said needs may soon become basic ones, which will be reflected in the households’ behavior, which more and more often will acquire such financial products as insurance against theft, fire, and other risks concerning real property or life insurance or insurance against loss of work.

To implement the postulated recommendations concerning modification of both categories would call for enlargement of the group of experts and consultants within the scope of selected needs regarded as basic ones.

1 The results of the said research were not intended for publication in larger edition. Publication (under the “for official use” clause) of the first pioneer concepts of the subsistence minimum baskets that had been developed with IPiSS since 1973 took place only in 70-ties (Deniszczuk 1977, Tymowski 1973).
2 The source of that knowledge is a school education, radio and television programs, and articles in daily press and magazines on rational nourishment and management of household budget.
3 The costs of exploitation provide for third party liability insurance (with discount for clean, in terms of accidents, driving record), technical survey, oil replacement, other repairs and moderate car run (12.5 km daily), which considerably differs from commuting from suburbs to big city centers. The model is closer to small town communities.
4 The phenomenon of homelessness as a manifestation of extreme poverty was regarded as a condition below the subsistence minimum.
THE YOUNG GENERATION OF FORMER STATE FARMS: INHERITING OR OVERCOMING POVERTY?

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Institute of Philosophy and Sociology of the Polish Academy of Sciences, Warsaw

The research entitled “Inheritance of poverty and coming out of poverty among the families from former state farms”, aimed at analysing the situation of the young generation, was one of three research studies concerning poverty among children and adolescents conducted within the framework of the Poverty and social exclusion and methods of combating them project headed by Prof. Stanisława Golinowska. The starting point of these research studies was the identification of activities, programmes and institutions that either support young people in tackling poverty, or, on the contrary, lead to poverty becoming permanent.

Child and adolescent poverty is a particularly dangerous phenomenon, as it not only constraints physical development, impedes socialisation and provides a difficult start in life, but also carries the risk of making the situation permanent. The threat passing poverty onto the next generation, one could say “inheriting it”, is realistic in Poland. Research on social mobility shows an increase in the processes of making the social structure more rigid and inheriting social status in the 1990s, especially at the top and bottom of the social ladder – amongst the most affluent and best-educated social strata on the one hand, and, amongst the poorest and worst-educated ones on the other (Domański 2000). Research has for a long time been pointing to the existence of such a threat in the former state-farm communities (Tarkowska 2002, Tarkowska, Korzeniewska 2002; Karwacki 2006).

Therefore, the first aim of the undertaken research was to deepen our knowledge on the currently important issue of the
durability of poverty, including its “inheritance”, i.e. the extreme and most dangerous form of poverty as a permanent condition. At the same time, the research contributed to the study of the temporal dimension of poverty, which constitutes a significant theoretical and practical issue in analysing the mentioned phenomena, both in Poland and worldwide (Leisinger, Leibfried 1999; Grотовska- Leder 2002). It should be mentioned that this is a particularly valuable and interesting contribution, as researchers most often analyse two- or three-year long periods of poverty (i.e. benefiting from social welfare support), while the research of the author of this paper took a much longer period into account.

The choice of such a time scope of was connected to defining the research subject and selecting the people to be interviewed. The research subject was the fate of young people coming from former state-farm families living in poverty – families which in the period of 1997 to 1998 had been included in the study “Old and new forms of poverty – the lifestyle of poor families”. The findings of the study were most comprehensively presented in the book Zrozumieć biednego (Understanding a Poor Person), edited by the author of the present paper (Tarkowska 2000), and in the book edited by Hanna Polska (2002). The lives of these families, analysed from the perspective of three generations, as well as the changing conditions of poverty, its characteristic features, including durability and depth in the individual families, had been identified and studied in these research projects. The fact that the researchers were able to return to the same families after a few years – the dream of every scholar – not only made it possible to conduct research within a larger time frame, but also allowed to include a generation which was just becoming independent. Furthermore, it permitted the verification of certain hypotheses put forward on the basis of the original research study.

The second issue the research investigated and shed light on is the connection between poverty and the specific periods of the family’s life cycle. This is a question sociology of poverty has been dealing with from the beginning of its existence as a discipline, i.e. the publication of the now classic work of B. Seebohm Rowntree. And yet, it seems that studies on Polish poverty insufficiently take this connection into consideration, while it is an important one from the point of view of social welfare activities. This research might also be perceived as a contribution to a very broad and essential problem, namely the situation of young people in present-day Poland – the identification of the possibilities and constraints young people are faced within the field of education, work, housing and independent life. The specific character of problems faced by the young living in poverty, such as social exclusion and marginalisation, also says something about the society and its institutions.

Moreover, this research broadens our knowledge about former state farms, their former labourers and their families. Our knowledge about former state-farm settlements as enclaves of deeply-rooted poverty is at present comprehensive. It shows how a whole range of macro social, structural, cultural and political factors has made former state-farms become places where many difficult social problems such as unemployment, poverty, a long-term dependence on social welfare benefits and other phenomena (poor education, the fact of having many children, low educational aspirations of parents towards their children, the lack of perspectives for adolescents – a factor particularly conducive to various pathologies, limited mobility, hindered communication with the external world or sometimes even total isolation and spatial marginalisation which automatically activates the processes of further isolation and marginalisation) are concentrated. The above are coupled with different pathologies, e.g. alcohol abuse, domestic violence and various criminal activities: theft, poaching, and – in villages situated near the border – smuggling, used to obtain means of living. Unemployment and poverty that results from it is a key issue. As state-farms were very often the only place of work available on the local labour market, it was unlikely for their workers to find a new job after they had been closed down. Poor education, the lack of adequate vocational qualifications or a very narrow profile thereof (e.g. in the case of a milkmaid or cattleman) were considerable obstacles in finding a new job.

The spatial isolation of the settlements, their large distance from potential workplaces and the lack of sufficient means of transport often turned out to be an insurmountable obstacle. Equally important was the prevailing negative opinion about state-farm workers within their local community – the stereotype of “pegeerus” (an insulting name for persons coming from the state-farm community) functioned. The reasons enumerated above caused unemployment among former state-farm families to become long-term, chronic and even inherited by the following generations. One more phenomenon present in former state farms should be mentioned and it is that of family unemployment – when several adults in a given family remain without work.

Although with time a considerable number of former state-farm workers managed to find new jobs, received the right to benefit from disability and old-age pensions, and therefore at present not all of them live in poverty, the problem is grave. A recent survey carried out by the Central Statistical Office (GUS) shows that in 2004 as much as 45% of the inhabitants of rural areas who do not own farms (it may be assumed that these are in most cases former state-farm labourers and their families) live in extreme poverty, below the subsistence minimum (GUS 2006a, p. 103).

Poverty in former state-farm communities bears the characteristic features of Polish poverty as such, i.e. it is localised in rural areas, the poor are affected by long-term unemployment, they have many children, the head of the family is poorly educated, they have limited qualifications and there is a negative influence of a poor neighbourhood. Researchers investigating poverty, unemployment and social exclusion in Poland must take former state farm communities into account, as it is there that all of the above-mentioned negative phenomena are intensified and correlated with one another. Firstly, the threat of poverty “inheritance” and a permanent marginalisation leading to social exclusion is present. Secondly, related to the above-mentioned, is child poverty, posing a threat to the future condition of the society. Thirdly, the youth lack perspectives, both in the area of education and on the labour market. Fourthly, a typically Polish feminisation of poverty – women living in poverty are overburdened with additional chores, they are, so to speak, “poverty managers”.

Next, alcohol abuse, which has become a real social plague. Although it concerns mainly men, for whom drinking is a way of reacting to the difficult situation, women drink as well. Moreover, a considerable increase in alcohol abuse among adolescents and children may be witnessed at present. Naturally, excessive drinking is not limited to the state-farm community or to people living in poverty; it is, however, a significant problem among the poor. The everyday life of former state-farm families affected by poverty is not easy, as they have a feeling of failure, as was shown in the study “Old and new forms of poverty”.

The original research comprised 27 families. For the purpose of the second panel research, ten families of former state-farm workers were selected; however, only eight of them were included in the study sample. Six of them were full families, one was composed of a widow and her children (her husband died a year before), one of a single mother left by her alcoholic, riotous husband many years before, when the children were small. The majority of the families analysed were multi-child ones, with three to nine children in each family. In total, the study presented the fate of 56 persons – 34 boys and young men and 22 girls and young women. Within this study group, 20 persons are still undergoing compulsory education (in primary or lower secondary school), 5 persons (siblings from one family) have completely and successfully overcome poverty (they are now studying and seasonally work abroad), 7 persons have a permanent job and...
12 persons are engaged in temporary seasonal work. Three persons are on welfare, staying at home waiting for better times and 5 women are at home raising their children. The fate of three men took a tragic turn: one committed suicide, one fell seriously ill and one is serving a prison sentence.

The research was conducted from November 2004 to January 2005. The research tool was, similarly to the one of the original “Old and new forms of poverty” study, a retrospective in-depth interview, encompassing the period analysed by the previous research until the present. The reconstruction of the young generation’s situation focused on three issues: education (the level of education accomplished; cases of interrupted education, future plans concerning education), work (job seeking, finding a job, the character of the job performed, plans for the future), and attempts and ways of gaining independence (establishing a family, having children – the current situation and plans for the future).

The poverty of the families investigated between 1997 and 1998 was diversified, as were the methods of coping with it, including – in some cases – inertia resulting from helplessness. Certain families were threatened with passing the model of living in poverty and unemployment onto the next generation. These threats and concerns proved to be grounded to a certain extent; however, it must be stressed that only to a certain extent. The representatives of the young generation are characterised by wide diversity of lifestyles and choices, not only in different families, but also within one particular family.

The lives of young people of the former state-farm origin, the history of their education and employment seeking, job records, as well as attempts to start living independently demonstrate a variety of methods used by families as means of coping with a difficult financial situation. Based on a limited number of cases, the study showed, on the one hand, mechanisms of continuity and persistence, as well as the deepening of poverty (strategies of survival or vegetation, dependence on the family and institutions) among young people coming from former state-farm families, and on the other hand, the coping strategies enabled by finding employment (in most cases, on-and-off, undeclared jobs in the “shadow economy”), and, finally, optimistic accounts of young people who have managed to combine education with work allowing for further education. Children of former state-farm workers cannot count on their families to help them become independent; moreover, some of them enter adulthood not only with a negative heritage (e.g. alcohol abuse within the family), but with a significant burden, namely their parents or younger siblings living in poverty who await their support. Several issues ought to be stressed at this point.

Our research has, first of all, shown the connection between poverty and the period of the family’s life cycle. In general, the families analysed lived more affluently at present than eight years ago. One of the reasons or, as it seems in many cases, the main reason for such an improvement is the change in phase of family’s life cycle. The families’ poverty was particularly severe when all the children were of a nursery or primary school age, when they required financial security, care and were the cause of constant expenses. Today, when some of children have grown up and have become independent, the families have less difficulties surviving. The departure of a grown-up child from home means the family, has negative consequences for the process of gaining independence by young people. The fact of not being familiar with the role of family’s cultural capital should not be underestimated. It is particularly the hidden one that is difficult to identify, as described by Hanna Palska (2002). Examples of such a capital are, for instance, a Russian grandmother with secondary education, a grandfather or great-grandfather, who sought his fortune in America, or any other significant events in the family history, connected with education or a “career” somewhere far away, in another country.

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Family structure is equally important, especially the fact of having many children, so characteristic of families of former state-farm workers. Such families were the most numerous ones in Poland and today they are the poorest ones. It should be mentioned the extreme poverty coefficient for persons from multi-child families was of 40.1% in 2004 and of 44.0% in 2005 (GUS 2006a, p. 197; GUS 2006b). Deep poverty experienced during childhood and the entire process of socialisation results in a low level of education, the lack of any professional skills and difficulties in finding job. After they manage to survive the most difficult period of family life (when they are little and go to school), many young adults from multi-child families who had been a “financial burden” for their family become a means of support for their parents and their siblings.

A so-to-speak hypertrophy of the family, reflected in the very typical poverty trait of limiting the social world to the closest family, has negative consequences for the process of gaining independence by young people. The fact of not being familiar with the external world, a certain self-isolation or self-exclusion when there is no job available in the area, makes the road to finding a job and gaining independence particularly difficult and, not rarely, painful. Furthermore, a stigma of state-farm origin follows young people during their education; pupils of state-farm origin are called abusive names, e.g. “pegeerus” [coined from the acronym PGR – state-owned farm] by their schoolmates or “state-farm morons” by their teachers.

The lives of children are also influenced by the present economic situation of the family, especially a total lack of financial resources. Former state-farm workers, unemployed for many years and not having any income, cannot expect any old-age pension in the future. Not only are they incapable of helping their children, but they also become a real burden for the latter.

The research of the young generation of families living in poverty in former state-farm settlements brings about several important issues that need be changed and improved:
First of all, it is essential to provide substantial support for multi-child families when all the children are little, when they go to school and are not yet independent. These families need support both to survive and to ensure that their children receive a proper education and will be able to get a decent job in the future. Second of all, the question of the parents remains unsolved — former state-farm workers who have been unemployed for several even or many years and have no financial resources will not be entitled to pensions in the future. This is an increasing problem for the young generation, an additional burden that hinders an already difficult start into independent life.

Third of all, former state-farm settlements are deserts in many respects: not only do they not offer any employment opportunities, but they also lack any social and cultural institutions. Young people run away from their hometowns, looking for places to live outside these communities, which are prone to deepening stagnation and a risk of an increase in pathologies.

Finally, as school is in many cases the only or one of very few institutions that children and adolescents have contact with, it has a key role to play. The school needs to intensify its activities oriented at pupils coming from former state-farm communities: help them graduate, acquire professional skills, gain self-confidence and hope for a better future. And yet, the school fails to fulfill these functions. While some teachers play a positive role in the life of the pupils, others do not. Often, poor pupils cannot benefit from scholarships, as such financial aid is only granted to schools offering a secondary-school diploma. Therefore the system does not function for young people from communities with very low educational aspirations, where getting a concrete occupation is seen as the ultimate achievement and step forward. Voluntary Labour Corps provide an important support in obtaining vocational skills by children and adolescents from such communities.

Taking everything that has been said above into consideration, these research projects, like other studies conducted within the framework of the “Poverty and social exclusion and methods of combating them” projects point to a general weakness and ineffectiveness of institutions, as well as to the lack of system solutions to problems faced by the young generation. At the same time, these research projects demonstrate the importance of some individuals, “significant ones”, whose support, advice and guidelines had an impact on the lives of young people.

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HEALTH AND DISEASE VS POVERTY AND SOCIAL EXCLUSION*

INTRODUCTION

Records based on international research on relations between poverty, social exclusion and the health status, indicates that all those factors are interconnected, diversifying health status depending on individual welfare and social status (Marmot, Wilkinson 2006). The task of epidemiology is to identify individual risk factors (i.e. high cholesterol) for occurrence of specific diseases, while recognizing social and economic causes of differences in health status is necessary to fully understand relations between social conditions and health (Marmot, Wilkinson 2006). The article presents first results of research on relations between health status and social status of the Polish population, based on available demographic, epidemiological and survey data from collected by the Central Statistical Office (GUS).

The health status of developed countries populations’ improved markedly during the past several decades and in Poland such an abrupt improvement of the health status has been observed since the period of political and economic transformation. However, in populations of West European countries, the improvement of the health status was not equally distributed in the whole population. It has been observed that the state of health of the privileged social groups improved much faster and had a lasting character, while inequalities between the groups on the top and the bottom of the social ladder in the developed countries continued to increase (Marmot 2005). Numerous studies on the causes of the inequality in the health status are undertaken in order to better understand and explain those tendencies. The research is not focused on the biological causes of the differentiations, but it locates health in the context of socio-economic inequalities connected with affluence, position on the labour market, lifetime experience and the place of abode.

In this understanding, health is described in accordance with the definition adopted by the World Health Organisation and understood as a state of physical, mental and social well-being and not merely the absence of a disease1. In line with this definition, research on the health status covers not only diagnosing and medical treatment, but also health promotion and prevention, ensuing health education, care for good living conditions, physical activity and diet and also guarantee of relevant social and economic conditions for the development of individuals. It is underscored that the state of health is a precondition for the development of social

* The paper is a synthesis of broader report from the research undertaken within the “Poverty and social exclusion and ways to combat them” project.
capital (Leon Walt 2004), while poor health of society members, is an obstacle to the economic development.

Investment in the health of citizens – both in medical services, corrective medicine and levelling out health-related social inequalities – leads to a growth of productivity and professional activity. Research results indicate a connection between the well-being (measured, for example, by the size of the Gross National Product) and health effects (measured, for example, by life expectancy) (Sen 2004). It should be noted, however, that this is a two-way connection, which means that not only the state of health influences productivity, but that ensuring well-being, that is curtailing the poverty sphere and increasing public expenditure for social care and its skilful management geared to the improvement of health effects, is of capital importance (Sen 2004).

OUTLINE OF THE RESEARCH PROBLEM

Analyses of the inequalities in the health status are broadly undertaken in Anglo-Saxon countries and recently by international organizations (World Health Organization, Europen Commission). These researches indicate strong relations between health status, labour market position and incomes. Similar analyses in Eastern-European countries have been difficult to carry out for many years, providing conclusive picture of relations between health status and factors of social status (Marmot 2005; Mackenbach 2006). This is attributable to the decomposion of the status factors until the end of the 1980s, i.e. education was not tied with the income level (Pohoski 1983). It can be assumed that poor health status of men was related typical for industrialization blue collar work characterized by unhealthy behaviour (alcohol abuse, smoking) and poor working conditions (Okólski 2004).

Diagram 1. Connections between poverty, social exclusion and state of health

Social research on the inequality of the health status in Poland is highly fragmentary and quite dispersed both as far as the scientific fields are concerned within the framework of which the analyses of the inequality of the health status are carried out, (sociology, medicine, anthropology, epidemiology, social epidemiology) and also regarding the subject matter. Sample research predominates concentrated either on the individual diseases or on population samples (territorial, for example). The small number of all-Poland studies concerning the inequality of the health status can partly be ascribed to the scarcity of the available epidemiological data (Óstrowska 1999). The epidemiological data are regularly collected based on the death certificates and doctor’s visits but they mainly serve setting out mortality and basic morbidity trends. Demographic and epidemiological public statistics allow only for partial analysis of health inequalities by factors such as sex and gender, age and region.

Survey data from the Central Office of Statistics (GUS) are an important supplement, as they describe the health status in a subjective perception along with a number of individual features characterising the socio-economic situation. However, the research is carried out at irregular intervals and the results published have the shape of simple analyses of the basic connections (GUS 1996, GUS 2004).

The purpose of the research, which results are presented withing this article, is to pinpoint the relations between poverty, social exclusion and the health status in Poland. Formulated have been additional research hypotheses concerning relations between the state of health and social and economic status of individuals (Diagram 1), the most important among which is the negative influence on health caused by the poor economic situation and selected social exclusion factors: poor education, unemployment, inferior living conditions and the lack of social ties.

Although links between the health status, poverty and social exclusion are bilateral, the stress in the research has been laid on the recognition of those socio-economic factors, which have an influence on the health status, rather than on health behaviours, which can contribute to poverty or social exclusion. The research problem defined in this way is located in the Anglo-Saxon tradition of analysing the state of health inequalities (Black and others 1982).

RESEARCH METHOD

The research is based on various sources and has been preceded by a detailed analysis of literature in order to identify the hitherto carried out analyses of connections between poverty and the health status in Poland and in other countries.

In the empirical part, an analysis of the available epidemiological data as well as data and information on the inequality factors in health such as lifestyle, for example, has been carried out. A model of quantitative analysis of the probability of the emergence of poor health based on survey data from the research “Health status in households in 2003” (GUS 2004) carried out by GUS and “Household Budget Survey” in the same year, has been prepared and applied. The model defines the probability of poor assessment of the health status2 depending on the diversification factors (sex, age) as well as inequalities (education, place of abode, housing conditions, expenditure level).

The unitary research has been supplemented with the analysis of the diversification of the health status in Poland on a regional level. The variables analysed in the regional models are the average life expectancy in particular regions and tuberculosis morbidity, while the poverty, registered unemployment level and the degree of the urbanisation of the region, served as explanatory variables.

In order to describe the health status of the population, used were both the measures constructed on the basis of epidemiological research as well as those based on the survey research. It should be noted that the measures refer to different populations: they either describe the health status of the living population in a given moment, or refer to the mortality among the population (life expectancy and mortality indicators). The following factors of the health status of the population have been used in the analysis:

- demographic and epidemiological measures:
  - research on life expectancy and expected years of life in good health and mobility,
  - mortality measure, including mortality connected with the individual disease groups and mortality connected with age (especially infant mortality),
  - morbidity measures including morbidity caused by diseases connected with poverty such as tuberculosis,
- survey-based measures, describing the state of health of the living population take into account:
  - self-assessment of the health status of respondents,
  - statement of diseases or suffering from chronic diseases.
The accessibility of data in the individual differentiation scales or socio-economic inequalities, seriously limits the analysis. Poland possesses sample records concerning the health status of the population as regards diversification into sex, age or region, but no data are available as regards the health status describing the social and economic situation (education, profession, income level). The problem in particular concerns the epidemiological measures, that is mortality, life expectancy and infirmity of the population. The analysis of the inequalities and connections between poverty and the health status is nearly exclusively possible while using the sample survey data.

**SELECTED RESULTS OF THE ANALYSIS**

In Poland, as indeed in other European countries, both in western and East-Central Europe (except for some countries of the former Soviet Union), the average life expectancy lengthened markedly in recent years. In Poland, the growth of life expectancy at birth is, next to the Czech Republic (5.2 years in 1980–2002 period), one of the highest in the post-communist countries (4.29 years in that period) (WHO 2005). This means a reversal of the unfavourable trend from the 1980’s connected primarily with the premature mortality of men.

A quick improvement of the health status of the population is connected with the drop of the mortality rate of the circulatory system diseases. The reasons of that phenomenon are sought in the changes in the lifestyle and, first of all, in the decreased consumption of animal fats in favour of the lighter diet based on vegetable fats and greater amount of fruits and vegetables consumption. (Zatorski, Willet 2005). Life style changes that result in decrease in mortality include healthy life-style promotion, decrease in alcohol consumption and smoking as well as creation of structures of civil society that impacts self perception and feeling of control over the ones life (Okolski 2004). Finally, health status improvement can be attributable to increase in availability of pharmaceuticals, access to new medical technologies and modern diagnostic treatment (Golinowska, Sowa 2006).

The lengthening of the average life expectancy in Poland does not occur equally in all regions of the country and the differentiation of life expectancy amounts to two years. The regions of the longest average life expectancy (above 75 years) are for following: Małopolska, Podkarpackie and Opole; while the shortest average life expectancy affects people in Łódź province and in western Poland (GUS 2005). Considerable are also differences in the average life expectancy in towns and countryside coupled with differences in life expectancy according to sex. The tendency is that, on the average, women enjoy longer life in the countryside and men in towns (GUS 2005).

Results of the regression analysis carried out in the research, point out that the level of urbanisation and unemployment rate are meaningful factors for regional differentiation of life expectancy, while poverty rate in the region, turns out to be an insignificant factor (it should be borne in mind, however, that there is a high correlation between the unemployment rate and the poverty level). The analysis shows that the lower degree of urbanisation, the longer life expectancy, which can be connected with the fact that women in the countryside live longer. Interesting from the perspective of social exclusion and poverty, is the negative connection between the unemployment rate and life expectancy; the lower unemployment rate in the region, the longer life expectancy.

However, the lengthening life expectancy of the population does not mean life in a better state of health. On the average, 18% (8.9 years of life) of life, Poles spend suffering from different diseases (WHO 2006). The diseases to a greater extent affect women, what, most likely, is connected with their life expectancy – women in Poland live longer but old age diseases to a greater extent affect them.

Suffering from tuberculosis is an important population health index owing to its connection with poverty. At the beginning of the 90’s increase in tuberculosis morbidity is observable in Poland and other countries of the region. The increase is attributable to the transformation period characterized by changes in production, employment and decrease in population incomes (Golinowska, Sowa 2005). After the transformation period, decrease of tuberculosis incidence is observable. In the last years (2000–2004) the trend continuous. However, the trend is not uniform in the individual regions and even in individual provinces (Opole, Warmia-Mazury) where the number of registered cases per 1000 inhabitants keeps growing. Considerable also are differences in the morbidity level between the individual provinces. The map of tuberculosis cases does not overlap either with the spread of general mortality and life expectancy or with the spread of poverty. In order to recognise the possible tuberculosis morbidity correlates, another regression analysis was carried out taking into account the same variables as in case of the investigation of life expectancy correlates. The results of the analysis showed that the tuberculosis morbidity rate is markedly higher in regions with the bigger share of the, on the average, poor educated population older than 65 years, that is population which could get infected during the post-war period. Another essential factor of high tuberculosis morbidity rate in the region is, as in case of average life expectancy, the high unemployment rate.

The last element of key importance for the analysis of the connections between poverty and the health status was the identification and description of relations between the declared health status and social and economic inequality factors. The health status self-assessment measure, despite its subjectivity, is closely tied with the epidemiological mortality and life expectancy indexes (Mossey, Shapiro 1982). This dependence is observed also in Poland on the regional level.

Earlier research on the inequalities in the health status in Poland point to some of the hypotheses regarding the ties between the health status self-assessment, poverty (measured by the income level) and the socio-economic position, including the educational level in the first place (Mackenbach 2006, Ostrowska 1999). The results of the analysis have been divided into several dimensions. Firstly, differentiations of the state of health regarding sex and age were observed. Secondly, described were connections with the economic position, profession and expenditure level in a household and, later, the influence of social ties on the declared state of health. The last group of results concerns ties between the health status and housing conditions.

The results of the logit analysis confirm strong differentiations of the health status as far as sex is concerned and the fact that women live longer but they enjoy a worse health status than men do. The health status is highly differentiated in age groups while the probability of poor health status grows markedly after the age of 35, which is a period for the emergence of serious diseases like tumours or heart diseases, for example. In the older age (60 plus), next to the circulatory system diseases, often observed are chronic diseases: rheumatological, diabetes, pulmonary diseases and hearing diseases that impact the quality of life.

The position on the labour market is a very important factor deciding upon poor or good health status. Exclusion from that market, be it due to unemployment, living on social assistance, old age and disability pensions greatly increases the probability of a poor health status. The influence of unemployment is visible not only directly for the jobless person but it also affects his closest ones – the results indicate that living together with a jobless person is negatively connected with the health status. Also living upon agriculture is negatively related to good health status.

Confirmed has also been the hypothesis of the negative influence of poverty on the health status. The location of the
Results of the analysis based on representative sample survey research confirm the psycho-social concept of explaining the inequalities in health, showing that social ties are yet another factor which could contribute to the inequalities in the health status. Firstly, the lack of ties in the closest environment, the lack of family living together have an adverse effect on health. Secondly, living in a big household with more than four members lessens the probability of poor health status. It happens so despite the fact that large families are more susceptible to poverty.

Housing conditions is the last factor for social exclusion analysed from the point of view of the influence on the health status. The analysis offers a hypothesis that poor sanitary conditions of a household and its overpopulation can have a negative effect on health. The hypothesis has not yet been fully confirmed. Although, as may have been expected, the possession of a bathroom in a flat/house essentially decreases the probability of poor health status, nonetheless the remaining factors (number of persons per room in a flat/house, possession of a toilet, etc.) turned out to be insignificant. The result can be a proof of rather good housing situation of the investigated households, but it cannot be ruled out that it is an effect of the selection of households taking part in the investigation.

SUMMARY AND CONCLUSIONS

Research on the health status inequalities in Poland and connections between poverty and the health status keeps developing. It seems that a lot of room remains for an analysis based on epidemiological measures such as mortality rate and life expectancy in relation to the individual social and economic position. The accessible demographic data show an abrupt improvement in life expectancy, but long life does not mean an improvement of the quality of the years lived through in good health. Taking into account the average number of years lived through in good health, Poland locates lower than other countries of East-Central Europe (Golinowska et al. 2006).

The available epidemiological data makes it impossible to state whether the improved life expectancy to an equal degree concerns all social groups; determined be it by the level of incomes (expenditures) or position on the labour market. This research of type, carried out in Great Britain and other countries of the European Union on a broad scale, is conducted in Poland in a restrictive manner. The analysis of connections between poverty, social exclusion and the health status is possible nearly exclusively on the basis of survey data. Research indicates that the improvement of the health status is social perception (self-assessed health status), despite being observed in the entire population, does not occur evenly. Especially susceptible to poor health status and diseases are persons living on non-profit-making sources, including especially the unemployed persons or persons living together with the unemployed.

Also the level of well-being in a household is a factor highly differentiating the self-assessment of the state of health and negatively connected with it. Finally, the lack of family ties and loneliness have a negative effect on the health status. The result of the analysis shows that both poverty (low level of expenditures), and social exclusion measured by a lack of family relations and basic social ties together with an adverse situation on the labour market essentially contribute to the poor state of health of the population.

1 Health is a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity, preambule to the Constitution of the World Health Organisation, adopted at the International Health Conference in New York 19–22 June 1946 by representatives of 61 countries, effective as of 7 April 1948 http://www.who.int/about/definition/en.
2 Bad self-assessment of the state of health is tantamount to the assessment of the state of health as worse than good on a 5-point scale (from very bad to very good).
3 Since the beginning of the 1990’s, in the countries of the former Soviet Union, observed is the phenomenon of the “health crisis” manifesting itself in the lowering of the average life expectancy (e.g. in the Soviet Union by about 2.2 years in 1980–2002, in Ukraine by about 1.8 years). The lowering of the average life expectancy is interpreted by a high number of deaths for external reasons. (Marmot 2005).
4 The Health Adjusted Life Expectancy (HALE) index estimated by the World Health Organisation is adopted for assessing the quality of life and life in health.

BIBLIOGRAPHY


HOMELESSNESS AS CONTINUUM: "ROUGH SLEEPING" TO OVERCROWDED HOUSING

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Polish Correspondent
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HOMELESSNESS AND SOCIAL EXCLUSION

Homelessness is recognized as extreme consequence of social exclusion by many policies on European as well as national level. Across National Action Plans for Social Inclusion for 2003–2005 (for EU15) and 2004–2006 (for EU10) different terms are used to describe the phenomenon. In Denmark the homeless are mentioned among disadvantaged groups next to drug users, adults and children from families with alcohol abuse, mentally ill and prostitutes. In the Netherlands it is believed that the homeless meet all criteria set up to define vulnerable groups: they lack sufficient skills enabling them to meet basic needs (shelter, food, income, social bonds) and at the same time share couple of social problems (exclusion, lack of self-care, unstable housing, deprived housing) do not receive adequate social support or their needs cannot be addressed by mainstream care system. Polish National Action Plan for Social Integration 2004–2006 mentions homeless people among four groups most vulnerable to social exclusion: Homelessness is the most extreme form of exclusion (…) and like in other countries it is accompanied by mental illness, disability, lack of job, crime and other.

CONCEPTUAL DEFINITION AND OPERATIONAL TYPOLOGY OF FEANTSA

From both policy and research perspectives homelessness as phenomenon is not easy to define. The group of activists working in various European non-profit agencies dealing with homelessness in cooperation with researchers from the European Observatory of Homelessness constructed a conceptual definition and operational typology of the phenomenon.

According to the conceptual definition there are three domains which constitute a “home”: physical, legal and social. The physical domain means shelter from unwelcome weather conditions like cold, rain, winds etc., the legal domain means stability in legal terms like possessing legal title to inhabited apartment, and the social domain means ability to perform social roles within it like marriage, having and bringing up children, securing privacy etc. Exclusion from any of the domains causes homelessness or housing exclusion which are two basic forms of one phenomenon. To give some examples: a family of farmers possesses a small house in the rural area. It is big enough to provide shelter for parents and their children. Parents are legal owners as they have inherited the house from their ancestors. However, the father is an offender; he uses violence in his relations with the family. Therefore, this family would be referred to as homeless or threatened with homelessness (according to different national legislations) as mother and children are excluded from the social domain, even though they have a “roof over their heads” and their legal situation is secured by ownership regulations.

The most extreme form of homelessness is exclusion from all three domains which is experienced by people referred to as “rough sleepers” or living in “inhabitable spaces” like railway stations, sewage systems, abandoned buildings, etc. They have hardly any protection from bad weather and are deprived of any legal titles to spaces they stay at. They also do not have their own private space to develop social relationships.

Analysis of various situations cased by some combination of exclusion from three domains is concluded by establishing four major conceptual categories: roofless and houseless referred to as homelessness and insecure and inadequate housing referred to as housing exclusion (although the dividing line between homelessness and housing exclusion varies from country to country). Both homelessness and housing exclusion are perceived as categories of one phenomenon.

Table 1. Conceptual and operational categories of homelessness and housing exclusion

<table>
<thead>
<tr>
<th>Conceptual category</th>
<th>Operational category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roofless</td>
<td>1 People living rough</td>
</tr>
<tr>
<td></td>
<td>2 People staying in a night shelter</td>
</tr>
<tr>
<td>Houseless</td>
<td>3 People in accommodation for the homeless</td>
</tr>
<tr>
<td></td>
<td>4 People in women’s shelter</td>
</tr>
<tr>
<td></td>
<td>5 People in accommodation for immigrants</td>
</tr>
<tr>
<td></td>
<td>6 People due to be released from institutions</td>
</tr>
<tr>
<td></td>
<td>7 People receiving support due to homelessness (supported, transitional)</td>
</tr>
<tr>
<td>Insecure</td>
<td>8 People living in insecure accommodation (with family, friends, no-legal subtenancy, etc.)</td>
</tr>
<tr>
<td></td>
<td>9 Living under threat of eviction</td>
</tr>
<tr>
<td></td>
<td>10 Living under threat of violence</td>
</tr>
<tr>
<td>Inadequate</td>
<td>11 Living in temporary, non-standard structures (caravans, squatting, etc.)</td>
</tr>
<tr>
<td></td>
<td>12 Living in unfit housing</td>
</tr>
<tr>
<td></td>
<td>13 Living in extreme overcrowding</td>
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</tbody>
</table>

In order to enable more practical application of the conceptual attitude, it was broken down into an Operational Typology of Homelessness and Housing Exclusion named ETHOS. It consists of thirteen different types of homelessness or housing exclusion described by operational category and generic definitions (Table 1.) for each of them. While the conceptual and operational categories of ETHOS are robust and remain the basis for the typology, the generic definitions of the typology are still being tested on national levels and reviewed by the European Observatory on Homelessness.

The recognition of thirteen types of homelessness and housing exclusion proves that the phenomenon should be treated as a continuum of different “housing situations” that people might find themselves in during their lifetime. Any policy to alleviate any type should consider it as part of the bigger phenomenon. Support for rough sleepers cannot be an effective means of tackling homelessness unless processes of eviction and overcrowding are recognized and addressed.

MEASURING HOMELESSNESS AND HOUSING EXCLUSION

One of the major purposes of ETHOS creation was to enhance international comparative analysis of the phenomenon which was previously not possible due to differences in national attitudes to data collection as well as huge gaps in existing systems (there are countries where hardly any data on homelessness is available except from numbers for small local communities and clients of certain institution). Homelessness is difficult to capture by massive statistics regarding big populations (inhabitants of the whole country) – homeless households are usually not included in data sources that are used for drawing the samples for majority of surveys (e.g. household surveys). They are also missed by general
population censuses. During 2002 Population and Housing Census in Poland enumerators were sent to the shelters and inhabitable places, but their effectiveness was so low, that Central Statistical Office has never published any results.

In Poland, major data sources used for estimating the scale of poverty fail to describe the situation of the homeless by inability to include them in the research samples. It regards Household Budget Surveys and Survey on Living Conditions prepared by GUS, Social Diagnosis Report and social opinion polls prepared by independent experts (mostly sociologists) as well as registers of social assistance clients collected by the Ministry of Social Welfare. It is legitimate to conclude, that poverty indicators fail to describe conditions of the most impoverished group of the society which is an obvious failure of the methodology. ETHOS was constructed as an alternative tool to fill the gap. It has been tested since 2003 on annual basis by National Correspondents of European Observatory of FEANSTSA, trying to apply it to national definitions and data collection procedures.

In Poland it has been tested since 2005, and proved to be especially useful in defining service gap in provision for people excluded from the three domains as well as for revealing a narrow understanding of homelessness that thrives in policy design and implementation.

**ETHOS AND POLISH TERMINOLOGY**

Thirteen types of ETHOS present a much broader understanding of the issue than Polish terminology would suggest. It is not the purpose of this article to revise existing definitions of homelessness especially that there are many of them and differences can be observed between researchers. However, there are four major terms used in Poland that can have certain ETHOS types prescribed (Table 2).

<table>
<thead>
<tr>
<th>Polish terms</th>
<th>Operational Category of ETHOS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Homeless “sensu stricto” (pl. bezdomni sensu stricito)</td>
<td>People living rough</td>
</tr>
<tr>
<td>The homeless (pl. bezdomni)</td>
<td>People staying in a night shelter</td>
</tr>
<tr>
<td>People in accommodation for the homeless</td>
<td>People in women’s shelter</td>
</tr>
<tr>
<td>People receiving support due to homelessness (supported, transitional)</td>
<td>People in accommodation for immigrants</td>
</tr>
<tr>
<td>Potentially homeless or threatened with homelessness (pl. potencjalnie bezdomni lub zagrożeni bezdomnością)</td>
<td>People due to be released from institutions</td>
</tr>
<tr>
<td>People living in insecure accommodation (with family, friends, no legal subtenancy, etc)</td>
<td>Living under threat of eviction</td>
</tr>
<tr>
<td>Living under threat of violence</td>
<td>Living in temporary, non-standard structures (caravans, squatting, etc.)</td>
</tr>
<tr>
<td>Housing deprivation (pl. depresyjacja mieszkaniowa)</td>
<td>Living in unfit housing</td>
</tr>
<tr>
<td></td>
<td>Living in extreme overcrowding</td>
</tr>
</tbody>
</table>

Besides the above theoretical comparison, on policy design and implementation level issues of housing for low income families and issues of homelessness are separated and not dealt with as interconnected problems. Solutions for people in shelters are not looked for within the housing system, rather through programmes of supported employment, social cooperatives and social integration initiatives. Housing programmes (like social tenement housing, communal housing) are dedicated to serve people living in overcrowded and substitute housing conditions. Social housing is granted as punishment (degrading housing quality) for people with notorious antisocial behaviors (loud parties, alcoholism) and rent debts. It is rather not thought of as support option for people "graduating" from shelters for the homeless.

**SUPPORT SYSTEM**

Polish terminology used to describe the phenomenon of homelessness and housing exclusion mirrors divisions established on the level of service provision. The homeless, homeless ‘sensu stricto’, potentially homeless and housing deprived people are subject of separate policies and support programmes. The following section gives a brief description of the system for the first two categories.

| Table 3. Basic characteristics of the homeless population in Poland |
|-----------------------------|------------------|--------------------------|
| M. Wachowicz, Research Report, Kielce 2005 | Socio-demographic portrait (Pomerania) |
| **Basic description** | Survey of opinion of social workers from public welfare centres in representative (territory and population) sample of gminas. Respondents were asked about the number and basic characteristics of homeless people on their territory |
| | Point in time headcount survey of homeless people residing on the territory of Pomerania Voivodship undertaken biannually in December since 2001. |
| **Constraints** | Discretionary definition of homelessness based on the decision of the respondent |
| | Data is available only for one region, procedure of extrapolation never worked out. Strong reliance on institutions holding certain authority over respondents (local police, welfare workers) in gathering survey forms. |
| **Overall size of the homeless population** | 62,000 number for Poland based on extrapolation of results from the sample |
| | 2470 number for Pomerania Voivodship |
| **Basic characteristics** | Women 22.7% Men 77.3% Biggest age group 41–60 61.1% |
| | Dependencies: alcohol 51.7%, medicines 6.5%, drugs 2.9% |
| | Length of homelessness 1–5 years 48%, over 10 years 16% less than a year 16%; Employment 11% (from time to time, at shelters) |
| | Women 17% Men 83% Biggest age group 41–60 62% |
| | Dependencies (no data) |
| | Length of homelessness 0–2 years 24.4%, 6–10 years 21.9% |
| | Generating income through employment 10.8% |
| **Causes of homelessness** | Disintegration of the family 46.1% |
| | Signing out from registered apartment 28.3% |
| | Loosing job 26.3% |
| | Alcohol dependency 16.2% |
| | Heath problems 14% |
| | Own choice 12.8% (declared spontaneously 2.4) |
| | Conflicts with the law 7.7% Other 6.3% |
| | Structural: |
| | Eviction from apartment 26.6% |
| | Leaving home to the family 19.3% |
| | Indebtedness 9.9% |
| | Escaping domestic violence 4.7% |
| | Leaving foster houses 0.7% |
| **Individual:** | Alcoholism 42.9% |
| | Disintegration of the relationship with the partner 39.8% |
| | Own choice 33% |
| | Disability 12.9% |
| | Mental disorder 8% |
| | Drug addiction 2.1% |

A support system for the homeless and homeless ‘sensu stricto’ is developed mostly by non-governmental service providers (running warming up rooms, night shelters, shelters, soup kitchens, advisory services, washing rooms and social work programmes).
in cooperation with local government that co-funds part of their activity based on the regulations of Social Welfare Act11. NGOs organize substantial support from private sponsors (food, furniture, construction materials, etc.) and agendas of other levels of public administration (wiovdowship government, Ministry of Labor) as well as structural funds of European Union. Based on Polish Statistical Updates from 2005 and 200612 the system can be characterised by following conclusions:

- The majority of service providers are non-profit organizations: 80% of (night)shelters and 86% of stock are provided by NGOs; 50% of (night)shelters are run by non-network organizations other than CARITAS, TPBA, MONAR and they provide 40% of stock.
- Lack of transitional, supported services (contract and training apartments, supported living in social housing apartments), although some projects based on multi-sector cooperation appear (Wolski Program Reintegracji Społecznej “Druga Szansa”).
- There are no standards for services, although two initiatives came up recently (Caritas Kielecka, Pomorskie Forum).
- Reintegration is undertaken rather through supported employment (local activation centres, social enterprises) than through housing for low income and specialist support needs people.

Although, there is no single national study allowing for description of overall homeless population of Poland, two studies can be cited, with their constraints taken into account, to give overview of characteristics of the homeless (sensu stricto included). None of the studies allows for direct comparison of results with the ETHOS structure, although some efforts have been made by Pomeranian Forum.

CONCLUSIONS

According to FEANTSA homelessness and housing exclusion are one phenomenon that can be broken down into thirteen different housing situations creating continuum. Operational Typology ETHOS with its generic definitions prescribed to each type enable international comparative analysis which may fill the gap in data collection systems on the most excluded groups of societies. In Poland understanding of homelessness is constrained to people who are roofless and houseless as defined by ETHOS. Although the problem of potential homelessness is noticed, there are no policies addressing it. Housing exclusion is considered to be a separate issue referred to as housing deprivation, difficult housing conditions, etc. As a consequence we observe a lack of services helping people to move from homelessness into housing and on the other side lack of prevention from housing exclusion.

LACK OF COMPREHENSIVE LABOUR MARKET AND EMPLOYMENT POLICY – WAY TO THE SOCIAL EXCLUSION?

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INTRODUCTION

Even seasoned researchers, when analysing a policy realised in a given domain, have doubts about the sufficiency of the scientific basis for its description and evaluation, and on the possibility to use its results for interpretation in political categories, i.e. in the process of struggling for power or keeping power. Therefore, at the beginning, we should stress that the performed analysis of the policy towards labour is contained in the category of policy and not politics. The word policy signifies a directional activity of a given entity in general or in a given domain, whereas the word politics signifies the struggle for power and exercise of power through the realisation of given ideas (ideologies) and a political programme.

The categories of policy and politics are not independent of each other. Political programmes are realised as a part of policy – but not only. Activities that are a part of policy are determined as well by other factors: more general rules, earlier regulations, pragmatics of activity, management culture and abilities etc.

The analysis of the labour policy has covered its main elements, characteristic for this type of approach, namely: identification of goals and methods, characteristics of the actions undertaken and their effects, evaluation from the point of view of the criterion of combating poverty and social exclusion.

The policy towards labour has two institutionally separate areas. One is the area of job creation policy or employment policy, which falls more in the economic than in the social policy domain. The second area is the policy towards unemployment, which is much closer to social policy due to the importance of the social protection element and to used resources – coming mainly from the redistribution of income, usually located in special-purpose funds (in Poland this is the Labour Fund).

4 ETHOS was launched by FEANTSA in 2005.
5 It is important to note that ETHOS has been approached as a dynamic process by which the typology can be refined as the understanding of homelessness and housing exclusion improves.
6 Broad information on application of ETHOS in European countries is available in European Statistics Updates of European Observatory of Homelessness published annually from 2003 by FEANTSA based on reports from National Correspondents.
7 In fact census methodology is used quite effectively for estimating the size of the homeless population on certain territory under condition of broad cooperation between all stakeholders (local service providers, police, welfare workers and academics).
9 And is currently being taken into consideration in the EU study on measuring homelessness 2006 (to be published in 2007).
11 (...) gmina is responsible for providing shelter, food and necessary clothing to each needy person on its territory (...), Act of 12th of March on Social Welfare.
The present article concerns job creation and employment policy and not policy towards unemployment, although both policies have common areas and can perfectly strengthen each other; however, they can also do harm to each other – bad employment policy or lack of it may increase the unemployment rate and the improper social protection of the unemployed and lack of instruments to motivate people to return to work may reduce the supply of work.

As a basis for this analysis, we have adopted the thesis that work is a basic and effective source of income, enabling people to live outside the zone of material poverty and social exclusion.

Before the research, two goals regarding the confirmation of the adopted thesis were determined. The first was the identification of economic and social policy programmes focused on creating employment in the perspective that work is an essential and effective source of income, enabling people to live outside the material poverty and social exclusion zone. The second goal concerned the assessment of the conducted policy – how and to what extent the conducted employment policy and other policies concerning jobs have taken the threat of poverty and social exclusion into consideration and to what extent where they effective.

The research was based on quantitative statistical methods (analysis of dynamics, structure and probability with the use of LFS [Labour Force Survey] data, the so-called October wages survey and household budget survey – HBS), and on an analysis of the qualitative research results, analysis of documents and regulations, and results of comparative analyses.

The research included three types of analyses: (1) analysis of the real processes: situation in the domain of labour and employment in Poland in the years 1990–2005, i.e. the so-called diagnosis, (2) analysis of the policy in the domain of employment from the perspective of poverty and social exclusion: analysis of political declarations, strategies realised jointly with the European Union, legal regulations, programmes and projects, (3) evaluation of the conducted policy in relation to accuracy (real occurrence of the social issues addressed), coherency and effectiveness (goals set vs. goals realised).

**CHANGES IN THE SPHERE OF LABOUR**

In the analysed period (1990–2005), dramatic changes concerning labour and employment occurred. The employment rate was reduced, particularly severely in two moments: at the beginning of the transformation period and at the end of the nineties. As a result, the Polish economy has been growing for several years at an employment rate amounting to 52%–53%.

![Unemployment rate, registered unemployment rate and employment index to the LFS in 1999–2005](image)

The reduction of the number of working people was accompanied by a radical change in income sources relations. The share of the population earning their living through income from work decreased in the analysed period by several percentage points while there was an increase in the share of the population earning their living with social allowances. When such a tendency occurs, not only work but also the access to allowances and their level are of crucial importance to the occurrence of the phenomenon of poverty and social exclusion.

There are three basic tendencies in the characteristics of changes in the structure of the working population:

- employment in industry decreased (average employment in the years 1990–2004 dropped by 37%); employment in agriculture remains at a relatively high level and employment in services is rising,
- productivity of work in the Polish economy increased; in the years 1990–2002 it grew by more than 65% (measured in relation to GDP), and in industry it more than tripled, 
- due to changes in the structure of the economy and as a result of its privatisation, employment in the private sector (75%) and small companies (over 90%) prevails,

- with the low average employment rate, the employment of young people and people in pre-retirement age is particularly low (for people aged 55–64 the employment rate is two times lower than average).

At the end of the 1990s, tendencies concerning the change of work character and working population structure grew in importance, and it seems probable that they will be further consolidated. The first of these tendencies concerns the change of character of the employment contract. The share of people working under the so-called good employment contract, i.e. for a specified or unspecified (the so-called permanent employment) period of time, guaranteeing full employment rights, is diminishing. The share of civil law agreements concluded by the employer with a single employee and task contracts, temporary or for substitution, limiting the certitude of employment and employment rights, is growing.

The second tendency concerns changes in the structure of the working population with regard to sex, age and qualifications. The share of working women and young people – in the age when the procration is the most frequent – decreased. In Poland, the occupational activity of women has always been relatively lower than in other countries of the “socialist block”. At present however, the tendency of decreasing employment of women is “against the stream” in comparison with the old EU members, and is much more pronounced than that occurring in some of the countries of the region.

The share of employment of people having the highest qualifications (university graduates) was growing dynamically. The employment level of people with secondary vocational education (mainly technical schools and training colleges graduates) remained relatively high, but the employment level of people without qualifications (after primary school) and people without professional skills (after general secondary school) was dropping.

The occupation concerning those tendencies from the point of view of the criteria of poverty and social exclusion enables us to identify threats that will emerge shortly and threats that will appear in the future. Due to the enlargement of the character of the employment contract, the phenomenon of the working poor will strengthen and, in the future, there will emerge poverty among the elderly, whose range of retirement protection will be limited and lower with regard to the so-called substitution rate, which is indicated by the progress prepared as part of the retirement strategy (Ministry of Labour and Social Policy 2005). This poverty will mainly affect old women. We should notice that, at present, the phenomenon of poverty among the elderly is lower than average in Poland (Central Statistical Office – GUS 2006).

**Occupational passiveness**

If only 53% of the population in the occupational activity age range works, there arises the question in what type of activity (passiveness) the other half of Polish society, amounting to 47%, engages.
In this other half of the society there are the following population groups: students, disabled (unable to work), people who have taken early retirement, unemployed and people resigning from seeking employment on the official labour market, emigrants seeking work abroad, people working illegally and housewives. The estimates concerning this “47%” would indicate the structure presented by the graph below.

Classifying the “47%” population according to reasons for occupational inactivity, we can divide it into three large groups, each constituting c.a. 30% of the total population: (1) students, (2) pensioners and the early retired and (3) the unemployed.

The first group of the “passive” population is students (almost 30%) and this is a very positive indicator. The share of young people in the system of university education in Poland is relatively higher than in other European countries. In the most recent period almost 50% of each class year have started university studies.

The second group of the analysed population is composed of pensioners and the early retired who are not always occupationally passive. They often undertake some work, and are attractive to employers due to the fact that, having full access to social allowances, they do not force the conclusion of a good (and more expensive) employment contract. They also migrate abroad to work there. Women from this group often depart to find work: they run households, take care of older and ill people, clean.

The third group – and probably the largest (over 30%) – is composed of the unemployed. This group includes short-term unemployed, long-term unemployed (over a year; this group has been systematically increasing), and people discouraged from seeking employment.

From the point of view of the poverty and social exclusion threat, long-term unemployment and resignation from seeking employment are the most important problems. The qualitative research on this population indicates that in this group exclusion from different forms of social life is the deepest – marginalisation is the highest. At the same time, those people undertake different forms of work to earn a living. The conducted surveys allowed respondents to indicate that these “jobs” have a double character from the point of view of the institutionalisation degree. On the one hand, this can be casual work for an employer (registered and paying taxes or existing in the black economy zone): small business, distribution of leaflets, helping at harvests, cleaning car windscreeners, selling flowers in cafes and restaurants, and prostitution. On the other hand, this can be independent work (self-employment): picking berries, mushrooms, herbs etc. outside town, gathering scrap, cans and other refuse ‘treasures’ in towns, gathering coal in illegal coal pits, poaching, helping cars to park, helping with supermarket trolleys, begging. We do not take into consideration income from criminal activity, although some forms of earning money are at the limits of legality.

Roughly 10% of the “passive” are people working in their own households, mainly housewives taking care of small or handicapped children. Recent research and reports indicate that the group of housewives has increased. It is not yet known if and to what extent the occupational passiveness of housewives is forced by the lack of employment and to what extent it is a conscious decision accepted by them and their families. The media have noticed this tendency and they describe examples of such choices³, mainly in the climate of acceptance. At the same time, the debate on the issue of remuneration for house-work has started again.

**Work abroad**

People working abroad are difficult to place in the dichotomous structure of working and not working population. If the unemployed depart to work abroad on their own, they will still figure in the Polish statistics as unemployed. People leaving under bilateral agreements on mutual employment (or other forms of agreed employment) will be treated as working. However, migrants that did not work and had no contact with the labour office before departing (e.g. school graduates or housewives) will enrich the Polish statistics of the occupationally passive. Furthermore, people drawing long-term social allowances in Poland: disability and retirement (not only early) pensions and going abroad to work will be treated as occupationally inactive. In consequence, the population of migrants seeking employment abroad may be counted among the "47%" population only percent to some extent.

From the point of view of the relationship between economic migration and social exclusion, the objective of departure, the character of work performed abroad and the bond with the country of origin or the country of destination are important. Research to date on the character of economic migration from Poland shows that this breaks down as follows:

- migration in search for work in general,
- migration to get extra income,
- professional migration – combination of professional aspirations with aspirations to better conditions of life.

The first and basic reason for the decision to depart is always work. Strategies related to work are, however, very different from one another. A massive phenomenon is seeking any job to have income. This concerns mainly people without employment in Poland or people originating from agriculture: from small and overpopulated farms. The determination to find a job results in a high level of readiness to accept work on the second-rate labour market, in difficult conditions, below qualifications, with non-formalised contracts and low remuneration. Polish migrants not only tolerate these conditions but also work very efficiently, very often at the expense of their free time, with a limited need for integration into the society of the country of destination. Social life and public behaviour in their country of origin are also very limited.

Related to the above is the strategy to get additional sources of income – extra earnings². People departing abroad to get extra income usually have some source of income in Poland: they are often employed, are owners of agricultural farms, have their business, draw a disability or early retirement pension, are supported (by parents or a partner). They leave for short periods of time, when they have longer holidays, stop their work or delay taking up jobs (school graduates). In this group we find representatives of all age groups. The young work mainly to earn money for their own flat, to have a start and work in a place other than their place of residence. Middle-aged people work to have a house and furnish it, and to have their own workshop or to pay for studies for their children. People at the pre-retirement age leave the most often to help their children or grandchildren to have a good start in life.

Strategies to earn extra money are well represented by seasonal workers departing to undertake work on agricultural farms in Germany, graduates of schools and universities undertaking job in commercial, gastronomic and hotel services, men working on seasonal construction sites, performing craft tasks or women performing nursing and care services. Even if this work is not
registered (although it is the more and more often performed legally), Polish employees have good relations with their foreign employer, and tend to return to the same farmer, owner or household every year. If this is permanent work then they organise a substitution for the period when they return to the country.

Also people not satisfied with the conditions of work in Poland, mainly due to low remuneration but also due to barriers to promotion or bad work relations, leave to work abroad. This kind of motivation concerns the so-called professionals. It can be described as a professional strategy. At present, in this group there are employees of the National Health Service (doctors and nurses) but also representatives of other professions: IT specialists, engineers, and architects, for example. If the country of destination encourages immigration then, in combination with the strong factor of professional aspirations, members of this group often decide to stay abroad permanently.

Remunerations

The phenomenon of poverty among the working population in Poland had a marginal character for many years. This situation started to change visibly at the end of the 1990s. On the one hand, a period of crisis in the Polish economy resulted in employers, who were concerned for the survival of their enterprises, not only offering worse employment contracts but also much lower salaries. On the other hand, rising unemployment with limited social protection of the unemployed has contributed to an increase in the readiness of people to accept offers under worse conditions. At the same time, the practiced flexibility of work has increased significantly, often as a perverse result of the existing regulations.

The analysis of working-poor is based on the information about earnings. Essential to the analysis is the relation between the level of remuneration and the character of the work contract. If the contract doesn’t stabilize the employment and at the same time doesn’t assure a decent wage the situation of the employee is doubly inconvenient: he is threatened by the fact that the contract runs out and he won’t be employed any more and more over his earnings won’t allow him to save money necessary in the period of searching a new job. In his perspective the statistics allowing to identify this relation should be of big relevance to the working-poor analysis. There are signals (GUS 2005 and 2006) and assertions (Frieske 2006), that worse contracts consolidate the unwanted phenomenon of underemployment and low earnings.

The statistical records of remunerations are not complete. The October survey on wages conducted systematically by the Central Statistical Office (GUS) does not cover small enterprises (below 9 employees), which can be of key importance to the issue of poverty among the working population as small companies are at present the main source of employment. It seems, however, that tendencies concerning remuneration in the examined employment establishments reflect also the situation of small companies, where the analysed phenomena are only more visible. What are these tendencies?

The distribution of remuneration is bent leftward in relation to the logarithmically normal distribution, which signifies that the majority of working people receive salary below the average level of remuneration. In the years 1999–2004 c.a. 65% of working people received a salary below the average remuneration. In the examined private sector, the share of people receiving such salaries is not only higher, but is growing. At present, this exceeds 70%. There are decidedly more women (73%) than men (60%) earning a salary below the average. The tendency is, however, positive for women. Their share among those earning less is slowly decreasing (GUS 2006).

What groups receive remuneration at the level of minimum wage, which has been regulated by law since 2003? According to the October survey on wages (GUS), mainly young people receive low remuneration, then people having little practical experience and/or low qualifications. In the private sector, low remunerations are paid to the majority of employed workmen. Here, mainly higher-level specialists are well-paid. In consequence, the diversification of wages in the private sector is significantly higher than in the public sector. In the private sector, an average remuneration in the X decile is c.a. 9 times higher than in the first, and in the public sector – around 5 times higher.

Statistical records would indicate that the private sector offers rather difficult conditions for young people and people without sufficient qualifications. The opening of selected European labour markets, with clear demands for low-qualifications jobs in some segments and in some countries, has offered the possibility of choice to young people. They often choose to work abroad.

Conditions of work

Restructuring of industry and a decrease in the share of the employed in heavy industry has resulted in a decrease in the number of accidents, which has resulted in an improved image of work conditions described with accidents indicators. At the same time, the implementation of EU directives on occupational health and safety standards has contributed to a slow but systematic improvement of working conditions in existing plants, usually accompanied by their intensive modernisation. If in 1985 a number of 194,000 accidents was registered, then in 2005 this number was reduced by over half, to 84,000. This tendency concerns also fatal accidents (1,115 in 1985 and 490 in 2004).

Statistics concerning diagnosed cases of occupational diseases are also more positive (a decrease of more than ten percent), although the scale of improvement is not so significant.

This general image of the improvement of working conditions indicators also has its less positive areas. These are located in agriculture, where the rate of accidents is two times higher than outside it. Indicators of accident frequency outside agriculture are still high in mining, construction and transport. A surprising fact is the high frequency of accidents in the health care sector (www.mpips.gov.pl)

Around 66% of accidents in general and 75% of grave accidents take place in private employment establishments. This results mainly from the fact that private employment establishments dominate the economy, and in the case of segments of the economy most threatened by accidents, the share of the private sector is very high. At the same time, the observance of occupational health and safety regulations is not sufficient. Private companies more often allow performance of too intensive work, working hours are not respected, and work is performed in risky conditions. Even if afterwards the fault is attributed to the employee, the motivation for such behaviours has its source in the employer.

The group most likely to be injured at work is young people having the shortest professional experience (below 3 years). This group represented over 45% of all injured in 2005. The consequences of accidents at work and occupational diseases are borne by the injured themselves and their families, and also other people working in the system of insurance solidarity. In Poland, the share of disabled people returning to the labour market is very low, and the social allowances for pensioners do not protect them against income poverty to the same extent that retirement allowances do.

Particularly dramatic is the fate of those injured in accidents and occupational diseases whose employment contract did not include social insurance or who undertook the work without such agreement. In conditions of high unemployment rates at the turn of decades, concluding such agreements was not a rarity. Relations at work are an important element of working conditions. Random research on this subject, as well as signals that can be found in press articles, indicate that friendly but ineffective relations with colleagues and managers, characteristic of the previous system (Narojek 1991), have definitely ended. Competition between employees, strengthened considerably by the situation of high unemployment rates and the necessary orientation
of enterprises toward achieving surpluses at low standards of management culture, lead in the situation of this new market economy to uncomfortable work atmospheres. Employees adapting actively to changing conditions and growing requirements lose control over the process of their own reproduction: they burn themselves out more quickly, are frustrated, and lose motivation to assume other obligations, including family and public ones.

**POLICY TOWARDS LABOUR**

The analysis of the policy towards labour (job creation and employment policy), just as the analysis of any policy, covers insights into the basic levels of creation: (1) determination of goals, (2) analysis of applied methods, and (3) identification and evaluation of effects. In the presented article I will restrain myself to identification and discussions related to determination of goals of the employment policy, with a very synthetic reference to methods. A complete analysis of employment policy in the context of poverty and social exclusion can be found in the report on research.

**Articulation of the goals of the job creation and employment policy**

The period of transformation did not abound in documents of strategic or even planning character oriented towards the determination of directions of a concrete policy with an unequivocally determined target effect. Documents programming changes of systems and institutions in individual domains (reforms) and legal regulations introducing those changes have dominated. We could say that the approach articulating methods and ways of action have prevailed and not its directions concerning the social effect.

This thesis in the glaring way concerned the employment. It was known that the transformation from the centrally planned economy to the market economy would bring in consequence the phenomenon of unemployment. There were no political or social concerns about this because the disadvantages of overemployment and low work effectiveness for the effective development of the country were so significant that they prevailed over the benefits resulting from full employment. Therefore, unemployment was seen as a positive motivation to better work and effective exploitation of work resources. There were, however, political fears of the consequences of too high unemployment due to the possibility of limitation of approval for systemic changes. Therefore, in the initial phase of transformation a decision on generous social protection was taken, including increased access to long-term social allowances – early retirement and pensions – not sufficiently internalising the consequences of these decisions for long-term unilateral redistribution of income and creation of high costs of work.

Documents created in the first period of transformation, elaborated only in the Ministry of Labour and Social Policy (e.g. *Assumptions of the programme for countering unemployment – 1991 or Goals of labour market policy in the years 1992–1993*) had difficulties diagnosing the new situation on the labour market: on the one hand, the fall of numerous state enterprises and of entire industries; on the other hand, the dynamic development of the private sector in the economy. They did not define directions of employment policy, concentrating on issues of institutional service of the labour market. Only under the influence of experts’ pressure has the Ministry of Labour and Social Policy prepared a more strategic document entitled *Programme for countering the unemployment*, containing a complex diagnosis of the situation on the labour market, informing about the need for a much wider integration of economic goals with social goals (Boni 2004).

Then, already in a period where the transformation crisis was overcome and the country entered a path of dynamic growth, a document supporting productive employment establishments was prepared as part of the governmental programme entitled the *Strategy for Poland*. This programme accentuated economic, rather than social, goals. It was disposed towards acceleration of economic growth in order to achieve the level of development of western European countries as well as the quick accession of Poland to the European Union, which was the basic political ambition of that period. There was a silent assumption that an increase in employment would be the natural consequence of economic growth. In this period, many actions to develop the institutional structure of the labour market and train the employment services were undertaken (*project of Promotion and Development of Employment Services financed with a loan from the World Bank*).

**Table 1. Main strategies and programmes concerning labour**

| Programme for countering the unemployment and alleviating its negative effects | Document prepared in the Ministry of Labour and Social Policy in 1993, adopted by the Council of Ministers |
| Programme for Promotion of Productive Employment and Reduction of Unemployment | Programme adopted by the government in 1995, component of the governmental programme *Strategy for Poland* |
| Programmes for occupational activation of the youth | Adopted by the Council of Ministers in 1998 |
| Programme entitled “Entrepreneurship – development – work” containing, among others the following packages: ● Entrepreneurship in the first place ● First job | Programme of the government in the years 2002–2005 |
| National Action Plan for Employment 2005 | Document prepared simultaneously with the act on employment promotion and labour market institutions (of 20 April 2004) in accordance to the conception of employment policy activation, adopted by the Council of Ministers in 2004 |
| Sectoral Operational Programme for Human Resources Development 2004–2006 | Document prepared in order to set frames for absorption of the means of the European Social Fund |

Source: Own specification.

The end of the 1990s was dominated by the preparation of documents and regulations focused on the design and implementation of four large social reforms: retirement, health protection and educational systems as well as the decentralisation reform, which in some way has reduced the interest in observing the process of transformation. Meanwhile, as early as 1998, the symptoms of the outlining crisis tendency occurred – a decrease in economic growth and a decrease in employment. At the same time, both the programmes of the four reforms and the programme of preparation for EU membership stipulated restructuring actions (in coal, metallurgical, rail, defence and electrical and energetic...
industries) leading to a decrease in employment. It was assumed that, as a result of those actions, employment will drop by over 300,000 people (Council of Ministers 1999). The increase of employment in regions and in industries of potential employment growth was postulated, but the achieved results were weak. At the same time the children of the post-war baby boom entered the labour market, additionally increasing working resources. The fall in employment (by c.a. 1.5 million people to 2002) and the increase in the unemployment rate (the rate doubled: 11% in 1998 to over 20% in the years 2002–2003) has assumed dangerous proportions.

Difficulties on the labour market were strengthened by the negative effects of the decentralisation reform. Employment services, trained with effort (loans from the World Bank), by losing their institutional affiliation with governmental administration and their financing stability, became dispersed. Employment in labour offices fell by c.a. 9% (MGiP 2003) which resulted in additional limitations to the access to labour market services in the situation of the highest unemployment growth.

Despite the dramatic situation on the labour market it was still assumed that the goals of high economic growth, the inflation goal and the increase of employment can be reconciled. The first Polish document of the European Employment Strategy – _National strategy for employment and human resources development 2000–2006_ was elaborated as part of the required pre-accession documents, and the Strategy of public finance and economic development Poland 2000–2010 included dispositions that were mainly ‘wishful thinking’ because solutions that took into consideration significant interdependencies and contradictions between goals were not formulated. In these documents, the possibility that unemployment may remain at a high level was not included as the economy was growing and had the tendency to grow further (Wiśniewski 1999).

**Priorities of the National Employment Strategy for the years 2007–2013**

- Assistance in the creation of new jobs through the development of entrepreneurship and innovativeness
- Development of continuing education and improvement of education quality
- Improvement of the adaptation abilities of the employees and employers, and improvement in the flexibility of the labour market
- Activation of people threatened by unemployment and social exclusion
- Improvement of institutional services of the labour market
- Elimination of regional differences
- Conducting effective migration policy

In the first half of the new decade the government accentuated an increase in flexibility of work through legalisation of the civilised solutions in this domain (temporary work, regulations on group redundancies, volunteer work etc.) and as part of the social dialogue with social partners. The solutions reached were compromise solutions; not very favourable to the flexibility of the labour market (e.g. minimum wage) but they reduced the employment relationships of ‘wild capitalism,’ as it was called.

Stubbornly low employment rates and a high rate of unemployment forced the government to take a deeper look into long-term development problems. The second strategy of employment, prepared in accordance with the methodological conception of the European Employment Strategy, was elaborated with a much higher level of awareness of the specific difficulties in reaching the growth of employment in Poland, higher abilities to analyse and prognosticate phenomena and greater political concern about the social consequences of strengthening unemployment.

At the same time, the Polish government has started preparation of strategic documents as part of the European methodology of open coordination in relation to combating poverty and social exclusion (in 2004 the National Strategy for Social Integration and two national action plans in this domain were elaborated), ensuring financing for a decent level of retirement pensions and ensuring health care services and long-term care (LTC). The employment strategies started to include on a wider scale the need to employ people having difficulties entering the labour market and remaining on it. A new term of ‘low employability’ was created as well as postulates of integration of people having low employability by creating not only highly productive jobs but also social employment.

**Specification 2. Main regulations concerning employment and working conditions addressed to problem groups and situations**

<table>
<thead>
<tr>
<th>Acts</th>
<th>Contents</th>
<th>Published</th>
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<tbody>
<tr>
<td><strong>Act on minimum remuneration for work – 10 October 2002, amended in 2005</strong></td>
<td>Statutory mode of decision concerning the level of minimum remuneration and definition of method to determine it, with participation of a Tripartite Commission and amendment introducing new indexation rules</td>
<td>Journal of Laws no 200, item 1679</td>
</tr>
<tr>
<td><strong>Act amending Act on social and vocational rehabilitation and employment of the disabled – 20 December 2002</strong></td>
<td>Another amendment of the act of 1997; decentralisation of means and decisions, and the mechanism of vocational and social rehabilitation financing</td>
<td>Journal of Laws no 7/2003, item 79</td>
</tr>
<tr>
<td><strong>Act on Social Employment 2003 – 13 June 2003</strong></td>
<td>New act introducing activation actions for people having important employment difficulties</td>
<td>Journal of Laws no 122/2004 item 1143</td>
</tr>
<tr>
<td><strong>Act on employment of temporary workers – 9 July 2003</strong></td>
<td>New act introducing temporary work agencies and regulating this type of employment</td>
<td>Journal of Laws no 165/2003, item 1608</td>
</tr>
<tr>
<td><strong>Act on particular rules for termination of employment relationship for reasons not related to employees – 3 March 2003</strong></td>
<td>Regulation concerning procedures applied to group redundancies (of more than 20 employees)</td>
<td>Journal of Laws no 90/2004, item 844</td>
</tr>
<tr>
<td><strong>Act on public benefit and volunteer work – 24 April 2003</strong></td>
<td>New act introducing rules of subsidising social organisations from the PIT and legalising volunteer work</td>
<td>Journal of Laws no 96/2003, item 873</td>
</tr>
<tr>
<td><strong>Act on employment promotion and labour market institutions – 20 April 2004</strong></td>
<td>Another act, the last of 1994 after numerous amendments</td>
<td>Journal of Laws no 99/2004 item 1001</td>
</tr>
</tbody>
</table>

Source: Own specification.

The basis to change the approach towards job creation is the introduction of the conception of the so-called social economy and the adoption of legal regulations of statutory rank validating the economic solutions not oriented towards profit (social employment, social cooperatives etc.)

**Dilemmas of the policy towards labour**

If we were to characterise the state policy towards labour in the period of transformation in Poland, we would have to say that it was in fact a policy of neglecting the negative social consequences...
resulting from the decrease of employment. Creating employment was not a priority of any economic programme. Systemic effectiveness and restructuring goals were realised at the expense of employment and deactivation of large professional groups without serious programmes for their reintegration into the labour market. The programmes of action counteracting the results of external shocks to the labour market (e.g. the Russian crisis) were not realised. Practically no instruments of active employment policy towards the unemployed were realised. This lack of priority of employment and entrepreneurship as well as numerous omissions concerning labour market policy require understanding and explaining why, with such a low rate of employment in Poland and such a high level of work demand, an intensive employment policy has not been realised. Why is there no policy in which employment would be an actually realised priority and not only a side-effect of other programmes?

Let us look more closely at the dilemmas of social and economic policy in the context of employment, concentrating the reflection of this article on policy toward employment demand. The increase of employment demand signifies the development of new companies and jobs. It was assumed that an increasing demand for employment in a country undergoing the transformation process and having large modernisation ambitions has to occur simultaneously with the restructuring of companies, dynamic adaptation to the changing conditions of the world market and immense competitive pressure. In short, it was not a policy of defending existing jobs that was important but a policy of assistance to the process of creating new jobs so that the balance of the process would always be positive: creating new jobs would prevail over the liquidation of old jobs and the new jobs would be more effective (productive) than the liquidated ones.

Economic growth vs. employment

The first problem that was revealed in the debate and in the contents of economic programmes on countering unemployment was the belief that economic growth is a factor sufficient to create employment. In the contemporary world relations between economic growth and employment are complicated. First, economic growth does not automatically lead to an increase in employment, the scale of this growth as well as its elements. In a very effective and open economy, having an important share of information services, the source of economic growth (and its result) does not have to be an expansion of the employment factor. It is the quality and productivity of this factor that is of decisive importance. This was the situation of Poland, where the effectiveness of work was considerably improved, while structural and institutional difficulties impeding the mobility and adaptation processes persisted.

The phenomenon of non-employment economic growth in Poland has been observed by Tito Boeri and Eugeniusz Kwiatkowski in their analyses. Kwiatkowski reached a conclusion that to achieve growth of new jobs, the growth rate of GDP has to be relatively high (over 5%). Are such growth dynamics possible in Poland? What would be its basic factors? This question has been answered positively, especially in analyses and opinions of the Social and Economic Strategy Council.

Capital and assistance for entrepreneurship

Another basic problem in creating employment concerns the sources of capital. From where shall the capital for investments and creating new jobs be drawn? The policy of creating employment requires an appropriate conception and directions of assistance to access capital, the basic growth factor. In Poland it has been assumed that the main source of capital is constituted by foreign investments, increasing access to new technologies and modernising the country. In a country poor in capital and technologically distant from the mainstream of innovations development, such an assumption is natural. However, at the time where this assumption was adopted and the privatisation and investment processes were subordinated to it, the policy of assistance to internal sources of capital creation and its transmission to entrepreneurship and development of national innovativeness were in fact neglected, despite numerous declarations accepting the need for assistance to entrepreneurship. As a result, when the process of flow of capital from outside is insufficient and the attractiveness of the country is not the main source of drawing it, a country without its own sources of investments loses the ability to influence its own development. Therefore, a policy of attracting foreign investments, _nata bene_ also requiring orientation and assistance, should be at the same time combined with a policy supporting access to capital and development of domestic entrepreneurship.

The contemporary labour market, in contrast to the labour market of the industrial age, is much diversified, stimulated by the development of services - services new in terms of their content and requiring new organisational forms. In this environment, small and medium-size companies manage particularly well. Therefore this sector, based on new qualifications adapted to changing work demand, should be as important an element of the economic strategy as the creation of conditions for attracting innovatively profitable foreign investments of large concerns.

Access to capital for small and medium-size companies was in Poland very limited, and the present introduction of certain advantageous changes is brought along by the introduction of EU regulations, liberalising too prudential dispositions concerning the activity of the bank sector, and by new sources of capital in the form of European structural funds with clear preferences for regional and local investment projects. Will those changes be sufficient to stimulate long-term development and the consolidation of small and medium-size business?

The policy to create new jobs, which are created mainly in the sector of small and medium-size enterprises, requires also the elimination of institutional barriers to business development. Institutional barriers are not only administrational barriers that are relatively easy to eliminate. The proof for that is the fact that the leaders in reforms to create conditions favourable to business activity are post-communist countries and Poland’s neighbours – Slovakia and Lithuania.

Institutional barriers mainly consist of an unfavourable climate for entrepreneurship, expressed not only individually and in a low voice, but also present in the activity of the basic public institutions – courts of law, treasury and self-government institutions. The reports on this subject (at least three were prepared as part of analyses conducted by the Ministry of Economy), examples of destructive decisions, and anecdotal stories of creating enterprises in Poland illustrate the ordeals that face determined entrepreneurs. In real policy, the institutional barriers to the development of small and medium-size business are underestimated, therefore even if some programmes are elaborated in this domain and some actions are undertaken, the effects are lower than we could expect.

Inflation vs. unemployment

From the beginning of the transformation period it was observed that the slowing rate of inflation is accompanied by the growing rate of economic growth. For that reason many prognoses on the social and economic growth of Poland assumed that the high rate of economic growth in the period 2000–2010 will be accompanied by a constant inflation declining tendency. It was also assumed that, as since 1994, the high rate of economic growth and declining inflation had been accompanied by a declining tendency in unemployment, such advantageous relations — not accelerating inflation rate of unemployment — will still be possible.

The course of events leading to a dramatic increase in the unemployment rate did not change politicians’ and experts’ position.
towards inflation. As it was described in the recommendations of the Social and Economic Strategy Council in December 1998: only in conditions of a ‘healthy macroeconomic regime,’ this is by ensuring the macroeconomic balance (budgetary and monetary in particular), is a high and durable rate of economic growth possible. Only such growth may lead to the systematic increase of national economies supply and increase of investments, and, in consequence, result in the creation of new and, what is equally important, competitive jobs (RSSG 2001).

The Council remained of the opinion that the shaping of relations between employment dynamics and wages dynamics is of key importance from the point of view of the possibility to create a durable increase in employment and, in consequence, to achieve a decrease in the open unemployment rate. The Council was dominated by the conviction that the policy of wages – understood as the whole of methods and instruments of direct and indirect influence on the level, dynamics and structure of wages – is of basic importance to the realisation of durable economic growth and the simultaneous reduction of the unemployment rate and inflation.

**Taxes and costs of labour**

Recently, the most discussed problem in the context of the process of employment creation has concerned the role of taxes. The argument of making economies, which are an important factor in the creation and attraction of capital, is the main argument used in striving to reduce taxes. Meanwhile, the promotion of economies and their reflection in investments required a much more complex policy than only reducing taxes.

From the point of view of the tax burden, the influence on the improvement of the situation in the labour market in Poland, much more important are now the non-salary costs of labour than company and personal income taxes, which are relatively lower than premiums (see the Figure below) (Golinowska, Neneman 2006). The tax wedge, covering both taxes (without indirect taxes) and social insurance premiums is high and amounts to 40%–47%. This is a factor reducing the employment mainly of people qualified to obtain low remuneration.

**Policy of a flexible labour market**

It is assumed that creating employment in the conditions of the contemporary labour market requires flexibility, covering the increase of different possibilities to hire and dismiss employees, more differentiated time and organisation of work, different employment contracts and principles of remuneration. Striving to increase the flexibility of the labour market is an answer to the necessity for entrepreneurs to more quickly adapt to competition driving by increasing globalisation. The policy of deregulation and flexibility promotion has been conducted for a certain time, also as part of the European employment policy, but with a growing awareness of the possibility of the occurrence of negative consequences, which leads to searching for methods to reduce the social risk of such policy. The research on the theoretic framework is conducted also for the complex flexibility policy and the coordination of its potentially negative effects. An attempt to describe it in the category of so-called transitional markets, proposed by the German economist of the labour market Günter Schmid11 is worth noticing here.

Striving to increase flexibility in labour market policy is at present evident and favourable it by the appropriate legal regulations and improvement of the functioning of institutions from the business environment brings along a decrease in unemployment. However, as perverse effects and social disadvantages are revealed, voices calling for non-admittance to flexible labour market policy developments become stronger.

Perverse effects require particular attention. The flexibility of the labour market, which leads to less stable and worse work conditions, decreases the motivation to work and favours escapes from the labour market. If the flexible labour market has wide authorisations and high social protection allowances, the resignation from work and earning one’s living through social allowances is quicker.

The awareness of perverse and socially negative effects of the flexible labour market leads to the simultaneous introduction of solutions that alleviate the disadvantages for employees on one hand and allow them easier adaptation to new conditions on the other. The conception of flexicurity, originating from Danish experience of labour market policy (Jansen, Larsen 2005)12, is situated in this group of actions.

In Poland, flexible labour market conditions were achieved due to new regulations concerning the hiring and dismissal of employees but in other domains, directly favouring employment, e.g. in reference to the labour costs, the effects were much worse (CASE 2004). The asymmetric actions may not only not improve the situation in employment but actually worsen it. On the other hand, insufficient development of active social solutions for people losing their job as a result of the introduction of the flexible labour market instruments may lead to an escalation of the problem of social exclusion.

**Policy of minimum remuneration**

The evaluation of the minimum remuneration in the context of poverty requires an analysis of the income functions of this category. The goal is to get an answer to the question as to whether the level of minimum salary ensures the socially acceptable and biologically sufficient level of existence of the employee receiving this amount as remuneration. The evaluation of the minimum remuneration policy in categories of social exclusion draws our attention to the employment aspect of the minimum salary. The problem is whether the given level of gross minimum salary does not constitute an employment barrier in conditions where it is possible to substitute human labour with capital.

In 2002 a decision on the statutory determination of minimum salary was taken. At the same time it was decided that the minimum salary for young employees will be by 20% lower in the first year of employment and by 10% lower in the second
Division into stages due to social and political consequences of employment reduction.

Strategies and programmes formulated by the government in relation to employment were not complex; usually they were reduced to the scope of competencies of the Ministry of Labour and Social Policy and concerned the labour market institutions and certain social protection of the unemployed (Boni 2003, Szylko-Skoczny 2004).

Legal regulations with regard to employment were created with participation of social partners and mainly trade unions, outdistancing themselves from the promotion of activeness in the domain of creating new jobs with the use of salary and tax instruments. The increase of the role of employers’ organisation at the beginning of the new decade led to more compromise regulations.

Goals of the employment policy were formulated without precisely indicating the methods to achieve them, including also the necessary institutional and personnel solutions as well as the financial means necessary to realise this policy.

In the period of the highest unemployment, among the employment programmes mainly social economy conceptions were developed and the appropriate regulations were introduced, favouring the creation of new jobs and the activation of people of low employability.

Poland’s joining the methodology of planning and programme work of the European Union has widened the horizon of analysing problems and searching for solutions. This concerns also the policy towards work and employment. At the same time the better and better prepared documents are insufficiently internalised by political groups on every level of authority, both governmental and local-governmental.

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1 The employment index amounting to 53% is obtained if we take as reference the population aged 15–64. If we take as reference the population aged 15+, the index is reduced to over forty percent.

2 The growth of work productivity in the Polish economy is observed by such authors as Jan Rutkowski (2002 and 2005) and Zbigniew Dresler (2006).

3 For example the report of “Polityka” No. 16/2006 — Matki, zony, kucharze [Mothers, wives, cooks] (author: Martyna Bundo).

4 This migration strategy was described as “migration to get extra earnings” (Rajkiewicz 1999), what very well reflects the motivation of such departures.

5 According to the surveys on salaries focused on small and medium-size enterprises (Juchnowicz 2004), low salaries occur more often in them than in medium-size companies: 22% receives salary below PLN 1000 and 52% below PLN 1500, whereas in medium-size companies respectively 15% and 50%. Small companies employ 10–49 people and medium-sized companies 50–250 people.

6 Reports on research realised within the project Poverty and social exclusion and methods of combating them will be published systematically in Institute of Labour and Social Studies (IPiSS) working papers for the entire year 2007.

7 Mainly professor M. Kabaj in the IPiSS.

8 e.g. the Programme for the Health Care System Employment Restructuring assumed the redundancy of 66 000 health care employees, i.e. around 10% of the total employed in public medical establishments Rada Ministrow 1999.

9 Those limitations were due not only to other priorities of macroeconomic policy (inflation) and high price of the capital, but also due to numerous disadvantageous actions (CASE/UNDP 2004, World Bank 2004 and 2005).

10 In international comparisons the most visible in Poland is lack of regulations advantageous to loans to the small and medium-size companies, e.g. regulations concerning public entrepreneur registers, legal protection of investors and state guarantees for loans granted to the beginning entrepreneurs.

11 Elements of this promotion can be found already in a EU document of 1994.

12 This conception was widely described in Poland by Kamil Zawadzki (2005) in the PhD thesis defended at the Mikołaj Kopernik University.

13 The solution in the spirit of flexicurity has been promoted by M. Boni for some time in his speeches and publications (among others in Rzeczpospolita). Recently, also M. Rymisz (2005) became interested in this approach, organizing a conference in the Institute of Public Affairs, thanks to which the study on the flexicurity was elaborated, although it is not entirely consistent with the original idea of this approach.
INTRODUCTION

Labour market situation is an important issue for the analysis of poverty and social exclusion. Poland experiences the lowest employment rate in the European Union for the 15–64 age group and still high registered unemployment rate at around 15 percent. The unemployment in June 2006 equalled 3.8 million, out of which 1.26 million have been registered as unemployed for 12 months or longer. Long-term unemployment almost 2.5 million, out of which 1.26 million have been registered as unemployed for 12 months or longer. Long-term unemployment among women, the disabled (two last groups sometimes move to inactivity and experience major difficulties with respect to the possibility of finding employment). Certain groups are especially prone to long-term unemployment and experience major difficulties with respect to the possibility of finding employment. These are e.g. older workers, the low-skilled, women, the disabled (two last groups sometimes move to inactivity after a long time out of employment). An important question is what policies could help these people.

Active labour market programmes (ALMP) form the policy aimed at the improvement of the prospects of their beneficiaries to find gainful employment or to increase earnings capacity. It is complemented by passive (income maintenance) labour market policy consisting of unemployment compensation programmes and programmes for early retirement for labour market reasons.

leads to persistent poverty of whole families and has an impact on employability and mentality of the unemployed. Employers, especially in times of a surplus of job candidates, use duration of unemployment as a proxy for characteristics affecting suitability for employment (e.g. motivation and productivity) which makes it even more difficult to find a job after the long period of unemployment.

Certain groups are especially prone to long-term unemployment and experience major difficulties with respect to the possibility of finding employment. These are e.g. older workers, the low-skilled, women, the disabled (two last groups sometimes move to inactivity after a long time out of employment). An important question is what policies could help these people.

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EFFECTIVENESS OF ACTIVE LABOUR MARKET POLICY IN FIGHTING POVERTY AND SOCIAL EXCLUSION*

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* The paper presents main findings from the report prepared for the project “Poverty, Social Exclusion and Methods of Combating Them”. The author is grateful to prof. Marek Bednarski for helpful discussions and to all participants of the project seminars at the Institute of Labour and Social Studies for valuable comments.
The main aim of the following paper is to assess the effectiveness of active labour market programmes conducted in Poland as a tool for combating and preventing social exclusion and poverty. First, we characterized people who could be defined as excluded from the labour market or endangered by such exclusion. Then we discussed ALMP from the point of view of overall expenditures, changes in recent years, effectiveness, and if it is oriented at helping the excluded groups. Finally, we give some recommendation for future policy in this field.

**METHODOLOGY**

Various research methods have been used. After analysis of the legislation, overview of previous studies and statistical databases, the picture has been enriched by two types of qualitative research:

1. In-depth interviews conducted in May and June 2005 in six poviat s differing with respect to labour market situation (bełchatowski, będziński, mielecki, mrągowski, radomski, węgrowski). Interviewed people were representatives of local public labour offices, social assistance offices and centres for the help for families, i.e. public institutions that are meant to help people with different types of problems, in that also joblessness.

2. Analysis of three volumes of diaries of the unemployed (Pamiętniki bezrobotnych) sent to the contest held by Warsaw School of Economics. They covered diaries written mainly in years 1999–2000.

Adopted qualitative methods allowed for the presentation of interesting good practices as well as barriers to using ALMP as a tool for combating social exclusion and poverty. In this paper results of interviews with the representative of institutions are presented in more details.

The main analysis was focused on years 2002–2005, so the period that on one hand could be characterised by levelling off the increase in unemployment and acceleration of GDP growth, and on the other hand, by relatively low rate of the creation of new work places, not sufficient to reduce long-term unemployment. In this period the new Law on Employment Promotion and Labour Market Institutions (implemented in 2004) created additional measures for easier reemployment of people with low qualifications and inactive and defined several groups of people “in the special situation in the labour market”: – the unemployed under 25 years of age, – the long-term unemployed, – the unemployed over 50 years of age, – the unemployed without vocational skills, – the unemployed single parents of at least one child younger than 7 years of age, – the disabled unemployed.

**ALMP IN POLAND**

Active labour market programmes in Poland include a broad scope of tools: trainings and retraining, intervention works, public works, traineeship and on-the-job trainings, employment subsidy, scholarship for education, reimbursement of costs of transport and accommodation, socially useful works, start-up business and entrepreneurship support.

Additionally, there exist separate programmes aimed at special groups of beneficiaries, e.g. supporting school-leavers in their job search, supporting vocational activation of older people (“Programme 50+”), or other programmes usually co-financed from the European Social Fund in the sphere of social and occupational inclusion and to combat discrimination and inequality on the labour market.

In 2005, 0.2 percent of GDP was spent on ALMP, increasing from 0.1 percent in 2001, which amounts to around 685 zloty per one unemployed person. In the past, expenditures on ALMP were procyclical, decreasing in times of net inflow into unemployment and outflow from employment and increasing when the situation in the labour market was improving (Figure 2).

![Figure 2. ALMP expenditures and unemployment rate in Poland in years 1991–2004](source: Ministry of Labour and Social Policy)

There are different methodologies and techniques to evaluate policy measures. Careful monitoring and indicators allow for deciding which programmes are more effective (and efficient) and could suggest the required changes in the policy.

Proper evaluation should base on the observation of the reference group of the unemployed of similar characteristics and not participating in the programme and take into consideration possible adverse effects. Simple indicator usually measure gross,
not net effectiveness of the tools in question. Net effect should encompass at least three following effects:

- **substitution**, i.e. substituting “regular” employees by the subsidised ones,
- **deadweight**, probably some workplaces would be created even without subsidies, increase in employment is not a result of the adopted measure,
- **displacement**, net effect of a specific measure is lower than gross effect due to disturbance on the labour market; for example subsidised employment could give an unnecessary advantage to one employer.

Employment effects measured by the public labour offices in Poland show subsequent employment rates after termination of the programme. They suggest that the best effects in respect of employment are these of trainings and start-up loans. The least effective are intervention works and public works (Table 1). Job-search measures have lowest unit costs, but possibly smaller than average employment effect.

### Table 1. Selected ALMP measures and their effectiveness in 2005

<table>
<thead>
<tr>
<th>ALMP Measure</th>
<th>Number of beneficiaries thousand</th>
<th>Subsequent employment rates per cent</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Re)Trainings</td>
<td>150.9</td>
<td>36.8</td>
</tr>
<tr>
<td>Intervention works</td>
<td>70.9</td>
<td>62.0</td>
</tr>
<tr>
<td>Public works</td>
<td>69.2</td>
<td>29.0</td>
</tr>
<tr>
<td>On-the-job training</td>
<td>66.9</td>
<td>46.1</td>
</tr>
<tr>
<td>Start-up loans</td>
<td>41.0</td>
<td>100.0</td>
</tr>
<tr>
<td>Other programmes</td>
<td>162.8</td>
<td>-</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>561.7</strong></td>
<td>-</td>
</tr>
</tbody>
</table>

Source: (MPIS 2006).

In their comprehensive studies based on individual LFS data Puhani (1998) and Kluve, Lehmann and Schmidt (1999, 2001) showed that training had a positive effect on the employment probability in Poland in second half of 1990s while intervention works seemed to lead to a negative treatment effect for men. Authors attributed the negative treatment effects for men to benefit churning rather than to stigmatization of intervention and public works participants.

As far as ALMP effectiveness for the long-term unemployed is concerned outcomes of previous studies are not very optimistic. More or less since 1997/8 separate programs for different high risk groups endangered by long-term unemployment have been implemented. These were e.g. former workers of state farmers, young graduates or non-active women. In years 2002–2004 there were more focused on the youth unemployment and on long-term unemployment. Puhani and Steiner (1997) found that the macroeconomic relationship between labour market flows and ALMP expenditure was not significant. Their microeconomic analysis revealed that ALMPs are not well targeted at the problem groups in the labour market like women or people with basic vocational education.

Similar conclusion has been drawn e.g. by Bednarski (1996). Effectiveness of ALMPs in case of the unemployed registered for 12 or more months is very low. Moreover, such people are not chosen by labour offices to more effective programmes and their exclusion from the labour market is persistent.

## RESULTS OF THE QUALITATIVE STUDY

Outcomes of our empirical qualitative studies showed that representatives of institutions perceive people as excluded from the labour market if they are without work for a long time. Employees of labour offices usually mention being registered as the unemployed for a long time. So the interviewees did not address all the excluded people.

Generally, four groups of people excluded from the labour market were usually mentioned by respondents:

- "drugs of society", often alcohol or drugs addicted, or ‘inheriting’ non-employment life style,
- persons with a low level of education and skills, "not capable to solve the easiest problem",
- the long-term unemployed that had lost employability which has to be rebuilt,
- persons with high qualifications but not capable to cope with the free labour market, discouraged people.

Above situations lead to poverty and social exclusion but whether the person is socially excluded depends on the society he or she belongs to. In some poviats people without work are treated as lazy, in other neighbourhood joblessness is popular and widely accepted way of life.

Additionally, they pointed to two groups endangered by such exclusion:

- young people with difficulties to find their first job,
- persons whose only gainful employment is in informal economy (grey economy).

It is worth mentioning that the situation of the latter group was not always perceived as unfavourable. Despite informal work does not include social security at least it provides income and make people "used to work".

Active labour market policy is not very efficient in helping the excluded people but it sometimes can have some positive effect. The long-term unemployed with low qualifications are not chosen to activation programs or participate only in measures that do not assure persistent comeback to employment. They could be stigmatised as participants of such programs as intervention works and their chances to convince free market employer that they are valuable employees are even lower.

Labour offices do not use any advanced measures of ALMP effectiveness, they observe only gross effect despite some of the interviewees mentioned that e.g. numerous programmes for the young unemployed could have adverse effect on other participants of the labour market. Also, according to some respondents, effectiveness of a programme is much lower if a beneficiary belongs to the group defined previously as excluded. Probability to participate in the effective programme often increases if a person actively contacts a labour office and potential employers.

A few practices of programmes prepared in the cooperation of several institutions and NGOs have been identified. They were specially tailored to the needs of local long-term unemployed and were multi step programmes with a relatively high success rate of stable inclusion to employment. Closer cooperation between different institutions allows for addressing also inactive people who never come to the labour office by their own, at most they contact only social assistance offices.

## CONCLUSIONS

Our analyses showed that active labour market policy in Poland is usually not focused on the labour market excluded, more active unemployed are also more likely to be helped. Also non-active people are usually not in the scope of active labour market policy which should be changed in the situation of very low economic activity in the 15–64 year old population.

Employees of labour offices avoid focussing on the long-term unemployed with low qualifications and other problems. It might suggest that more effective measures of ALMP are aimed mainly at these beneficiaries who would otherwise find employment. This issue needs better monitoring with a use of methods that allow for the assessment of the net effects of different programmes.

Cooperation between different institutions and multilevel programs are more successful (despite usually also more costly) in combating exclusion from the labour market and addressing
the most excluded people (who even do not ask for help). Role of psychologists and job advisers to change some people’s minds and mentality should be also underlined.

In future more important role could be played by social co-operatives that – despite existing, but still changing legislation – are not a widely used solution nowadays to prevent and combat social exclusion. Also a decrease in labour costs (taxes and social security contributions) and higher in-work benefits should be considered. That would help to move some employment in informal economy into a formal work.

BIBLIOGRAPHY


EDUCATIONAL SYSTEM, POVERTY AND SOCIAL EXCLUSION

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Poverty and social exclusion threatening children and adolescents, difficulties the young generation has in entering adulthood and the danger of poverty, unemployment and other negative phenomena becoming permanent in the future, as well as the role of educational and care institutions in tackling these phenomena and in weakening their effects have been the object of several separate studies within the Poverty and social exclusion and methods of combating them project headed by Prof. Stanisława Golinowska. One of them is the study of Elżbieta Tarkowska, Katarzyna Górniak and Agnieszka Kalbarczyk – "The educational system in relation to poverty and social exclusion", the findings of which are the subject of the present paper.

Undoubtedly, one of the most important and most characteristic traits of contemporary poverty in Poland is the young age of the Polish poor, i.e. the poverty of children and adolescents, the poverty of multi-child families and the very difficult situation of the young generation (mainly due to a high unemployment rate). Studies of household conditions conducted by the Polish Central Statistical Office (GUS) revealed that in 2004, similarly to the previous years, children and adolescents up to the age of 19 constituted over 40% of the population living in extreme poverty, i.e. under the subsistence minimum, while children up to the age of 14 made up 28% of that group (GUS 2006a, p. 12). Poverty studies also demonstrate that contemporary poverty in Poland is directly connected with the number of children in the family – multi-child families, i.e. with four or more children, are the ones most threatened by poverty. In 2004 as much as 40.1% persons from such families were living in extreme poverty; while the overall percentage for households was of 11.8%. This means that extreme poverty in households with many children was three times greater than the average rate (GUS 2006b, p. 197). It must be added that extreme poverty of multi-child families is still on the increase and in 2005 the appropriate percentage amounted to 44.0% (GUS 2006a).

Although many statistics have been made, child poverty is not appropriately recognised in Poland as a social issue, neither is the social exclusion threatening this group. Social exclusion is general rarely applied to children, despite the fact that the problem of the social exclusion of the young generation is very broad and encompasses the activities of many institutions: the family, school, employers, state institutions, as well as those young people who exclude their peers (Micklewright 2002, p. 18–19). Research studies conducted within the Poverty and social exclusion and methods of combating them project concerns only certain aspects of this broad issue, but fill in the significant gaps in our still insufficient knowledge on poverty and social exclusion of children and adolescents in Poland. Our knowledge is disproportionate to the social importance of problems such as the malnourishment of children, the poverty of multi-child families, unemployment and the lack of perspectives for the young generation, the processes of poverty consolidation and the threat of exclusion, etc.

The starting point of the "The educational system in relation to poverty and social exclusion" study was the role school plays encompassing the activities of many institutions: the family, school, employers, state institutions, as well as those young people who exclude their peers (Micklewright 2002, p. 18–19). Research studies conducted within the Poverty and social exclusion and methods of combating them project concerns only certain aspects of this broad issue, but fill in the significant gaps in our still insufficient knowledge on poverty and social exclusion of children and adolescents in Poland. Our knowledge is disproportionate to the social importance of problems such as the malnourishment of children, the poverty of multi-child families, unemployment and the lack of perspectives for the young generation, the processes of poverty consolidation and the threat of exclusion, etc.

The starting point of the study was the question of how Polish schools approach poverty of children and adolescents. Although many statistics have been made, child poverty is not appropriately recognised in Poland as a social issue, neither is the social exclusion threatening this group. Social exclusion is general rarely applied to children, despite the fact that the problem of the social exclusion of the young generation is very broad and encompasses the activities of many institutions: the family, school, employers, state institutions, as well as those young people who exclude their peers (Micklewright 2002, p. 18–19). Research studies conducted within the Poverty and social exclusion and methods of combating them project concerns only certain aspects of this broad issue, but fill in the significant gaps in our still insufficient knowledge on poverty and social exclusion of children and adolescents in Poland. Our knowledge is disproportionate to the social importance of problems such as the malnourishment of children, the poverty of multi-child families, unemployment and the lack of perspectives for the young generation, the processes of poverty consolidation and the threat of exclusion, etc.

Little is known about how Polish schools approach poverty – how schools perceive this issue, what methods they use to solve problems stemming from the poverty of pupils, how teachers define this problem and how other pupils refer to their poorer peers. Do schools provide support or, as researchers claim, can the following be said about children from neglected and marginalised families – “deprived of upbringing in the home, they do not find it [upbringing] at school either” (Lustig 1998, p. 67)?
The recognition of this twofold problem – poverty and the threat of the social exclusion of children and adolescents from certain milieus on the one hand, and the potential of schools or perhaps even the whole educational system in tackling or alleviating this situation on the other – is expressed in governmental documents and programmes referring to adolescents. Among the groups of people contemporarily threatened by social exclusion in Poland, the National Social Integration Strategy for Poland mentions both “children and adolescents from neglected milieus” and from “poverty milieus” as the most threatened ones (MPiPS 2004, p. 67, 69). The Strategy sees counteracting the social exclusion of these groups as the task of the educational system at its various levels, starting from nursery and primary schools through secondary schools, higher schools of education and post-graduate studies.

Meanwhile, the State Strategy for Adolescents for the period 2003–2012 speaks of “counteracting the marginalisation of the young generation”, enabling this group to have “an equal start into adulthood”, “providing equal educational opportunities” for adolescents from different milieus including those coming from rural areas, disabled adolescents, those living in areas particularly threatened by unemployment, coming from milieus exposed to social marginalisation, neglected and poor areas, adolescents who are outside of the system of education and the job market, problem families, poor adolescents (MEINS 2003, p. 12, 16, 19).

Attention has been drawn to this problem more than just a few years ago. All the reform proposals and projects drawn up in the last fifty years were accompanied by a diagnosis of the existing social inequalities in the area of education, social and spatial barriers in access thereto, as well as by postulates of providing equal education opportunities, i.e. “the democratisation of education” (cf. Kupisiewicz 2006). The idea of providing equal opportunities, an attempt of reaching a state in which “the attained level of education would not correlate with the traits attributed to the pupil at birth by his/her background” (Konarzewski 2001, p. 138) was also one of the main goals of the educational system reform introduced in 1999. One of the aims of our research was to identify how this idea had been implemented by the school as an institution and in its everyday functioning.

Many studies of this issue have been conducted; many aspects of inequality in education and many of its conditionings have been recognised; many intentional or side-effects of the educational system reform have been revealed. Therefore the first part of our task consisted in reviewing and somehow summarising the existing broad knowledge and the results of numerous research projects and analyses on the effects of the educational system reform from the perspective of: a) removing social inequalities, b) providing equal educational opportunities and c) activities undertaken by the school and the educational system as a whole to ensure a social integration of adolescents coming from low socio-economic status milieus.

Constituting a fundamental element of the research task and contributing to its originality (to the knowledge of the authors, this is the first study conducted in Poland which comprehensively analyses the issue of poverty in schools and the approach of the school to the problem), the second part consisted in a field study. A review of the existing research led us to the following conclusions:

First of all, the extensive literature on poverty in the family and on strategies undertaken in order to tackle it reveals the families’ helplessness as far as the children’s educational (and other) needs are concerned. A family struggling with poverty that touches all the areas of everyday life and having to cope with unemployment which has a destructive influence on the life of the household is not capable of ensuring favourable learning conditions for the children, nor is it able to provide the children with text books and other school accessories or help them if learning difficulties appear. As many statistics and research projects show, education in Poland, though theoretically free, costs increasingly more. Financial aid granted to poor families at the beginning of the school year proves to be insufficient.

Second of all, a family living in poverty does not find support in educational institutions when it encounters problems in the upbringing of children from the very beginning of the socialisation process. Researchers point to the key role played by nursery schools and early education in providing equal opportunities and making up for deficiencies in cultural capital, knowledge and abilities taken from the home. Attention should be drawn to the fact of closing nurseries down and a very low (ranking amongst the lowest in Europe) percentage of children attending nursery schools.

The number of children attending nursery schools is catastrophically low in villages and small towns, i.e. in places with the highest concentration of poverty and where there is the greatest need of providing an early compensation for the cultural deficiencies taken from the home. The number of nursery schools in villages has fallen by half between 1990 and 2004, from 5299 to 2595 (GUS 2005, p. 72). In the group of children aged from 3 to 5, the overall percentage of those encompassed by nursery school education as of December 31, 2003 was merely 34.3% – in towns this amounted to 58.9%, whereas in villages and small towns (i.e. places where poverty and other social problems are mostly concentrated), to 8% and 15% respectively (Herbst 2005). This situation is slightly improved by non-governmental organisations, such as the J.A. Komierski Foundation for the Development of Children with its “When there is no nursery school” programme, the goal of which is propagating and implementing new flexible and alternative forms of nursery school education.

Thirdly, research reveals that although it was meant to provide equal educational opportunities, the reformed educational system tends to maintain the existing inequalities and social differences. Access to education has become more limited due to the closing down of many schools, particularly in rural areas. Handing over primary and secondary schools to local governments and the ways of calculating the amount of educational subsidies granted have contributed to an increase in the discrepancies in the access to education (the transport issue is not fully solved), the quality of education, the equipping of schools etc. between schools in urban and rural areas. Rural schools in poor regions and poor communities are in the worst situation, as educational expenses are limited in these areas. In practice, this means that only the compulsory tasks are accomplished. As a result, the impairment of pupils from rural areas – which was pointed out by authors of subsequent reform projects – has not been set back. This concerns children from poor families – it is worth stressing once more that poverty in Poland is primarily located in rural areas and small towns.

Moreover, research studies reveal that the lower secondary school (gimnazjum), constituting a new educational-system tier that was meant to provide equal opportunities, has given rise to new problems without solving the ones of the past. Although they employ more qualified teaching staff and are better-equipped in workshops than primary schools, lower secondary schools are vast, anonymous agglomerations of adolescents of a difficult age that give rise to huge problems with bringing the pupils unknown to smaller schools. It is difficult to unequivocally say whether lower secondary schools contribute to making educational opportunities equal to adolescents. Analyses of the final exam result and other research show that goals opposite to the desired ones are being achieved, e.g. segregating pupils according to the social position of their parents and reproducing or even deepening social inequalities at this level of education (cf. Domalewski, Mikiewicz 2004).

Finally, the changes that have taken place on the secondary education level above all consist in a mass turn of adolescents towards general education, giving them the opportunity of pursuing studies at a university level. At the same time there is a significant decrease in the number of pupils choosing vocational schools. This
would prove that one of reform’s goals — propagating secondary education — has been a success. And yet, the results of the new final exams revealed great discrepancies between different schools and regions, which in turn reflect social and economic inequalities, do not allow for a positive evaluation of the reform. Furthermore, issues such as vocational education and its chronic incapacity to adapt to the needs of a changing labour market, as well as the lack of a so-called second chance for pupils who fell out from the educational system remain unresolved.

Transformations in higher education — the unprecedented increase in the number of educational institutions and the number of their students — prove that university education has reached the masses and that there has been a significant improvement in the access to education on this level. This phenomenon, however, also has negative sides, such as the fact that the increasing accessibility of higher education schools is coupled with the commercialisation of education and a fall in its quality. Moreover, the type of higher education institution chosen reflects the social position of the students’ families: state institutions offering the highest quality of education are attended by young adults from families with the highest socio-economic status, whereas private higher education institutions offering a lower quality of education are more easily accessible for adolescents from rural areas and small towns — it is there that students from poorer families study, paying for their education. The quality of the knowledge acquired is verified only later, by the labour market.

Research and analyses conducted so far show that the Polish educational system has many characteristics pointing to the existence of mechanisms that recreate or perhaps even deepen social differences. Despite such achievements as the propagation of secondary and higher education or the increase of the society’s educational aspirations, it is difficult — at least at present — to speak about a successful implementation of the postulate of providing equal educational opportunities for all. Critics claim that the reform could not have given other results, as it assumed that lower secondary schools, and not nurseries or the first years of primary school are decisive in the process of providing equal opportunities. According to Czesław Kupisiewicz, the causes of such a situation are even deeper and more permanent: The fact that in many cases educating children is the only way of overcoming poverty and breaking the vicious circle of cultural deprivation has still not been understood. (2006, p. 133). The conclusion of Andrzej Szpociński and Marek Ziółkowski, formulated while evaluating Poland’s first decade of independence seems to still be pertinent: The losers in the educational race are most often underdeveloped regions, inhabitants of rural areas and small towns and the poor (Szpociński, Ziółkowski 2001, p. 188).

What has our research, aimed at describing the situation of pupils coming from poor families and at establishing what kinds of activities are undertaken by the schools for these pupils, added to the picture? The field study conducted in October and November 2005 covered four different cases — four lower secondary schools. The data was collected by means of in-depth interviews and analyses of documents made available by schools and other institutions. The study was explorative in nature and revealed the existence of certain phenomena, but not their extent. The analysed four lower secondary schools were located in different areas with varied economic employment conditions and situations: a former state-farm village where many different negative phenomena connected with poverty and long-term unemployment are concentrated, a small town in a region also affected by unemployment, an average-sized town and large city where the poverty and unemployment rates are relatively low. The fact of choosing lower secondary schools for the study was determined by the function that this level of education was given by the implemented reform: it was to be an institution providing equal opportunities, the main "equalizer" of educational opportunities, to use Czesław Kupisiewicz’s coinage. Interviews were conducted with headmasters, teachers of the "best" and "worst" classes, with school pedagogues and psychologists, if such were employed by the schools. Institutions and local organisations connected with education and geared towards working with poor children and adolescents were also taken into consideration in each location: representatives of the local authorities (gmina), social assistance centres and non-governmental organisations active in the area were interviewed. We were interested in coming to understand and recognise the problems of poverty and social exclusion of the reality the schools function in and the actions undertaken by the schools and local institutions to satisfy the needs of the pupils from poverty-stricken areas and families.

Our research revealed the following problems:
1) the domination of the didactic functions in the school over the upbringing and care functions, as well as the disadvantageous effects of such a situation on pupils coming from poverty-stricken milieus;
2) the fact that teachers are not prepared to deal with the problem of poverty nor to work with children (and parents) from poverty-stricken, unemployed, marginalised milieus; furthermore, teachers use common knowledge and stereotypes when discussing these issues;
3) the trouble teachers have in identifying the problem of poverty at schools — neglecting, ignoring or belittling this problem or even denying its presence in school;
4) the typical mindset of the school, namely "poverty is not our problem" — the school delegates this problem to social assistance institutions; the school pedagogue becomes the "poverty expert" in the school, thus relieving the teachers of their duties of having any knowledge, orientation or sensitivity towards the problems of poverty;
5) the lack of systemic solutions in dealing with the problem of poverty in school, and therefore solely relying on the individual sensitivity of the teachers;
6) the domination of the ad hoc (social) activities over long-term (developmental) ones for pupils from poor families;
7) the fact that the school’s hidden curriculum not only excludes poor pupils (e.g. by organising school trips, introducing segregation to the school, not ensuring transport to and from school) but also stigmatises them (e.g. by providing free meals or additional support lessons);
8) the response of pupils to everyday life in school carries out poverty counter-culture behaviour (skipping classes, dropping out from school);
9) the lack of cooperation between the school and the parents, the fact that teachers are not prepared for having contacts with parents in general, including parents from poor milieus or unemployed and socially excluded ones; the bad mutual relations between the parents and the teachers (lack of knowledge, the paternalistic attitude of the teachers, mutual stereotypes, distrust); the need for a cooperation programme;
10) the fact that the school does not adequately make use of the potential hidden in its community, particularly that of non-governmental organisations, while it concentrates on cooperating with the system of repression and compulsion — the police, courts and probation officers.

Some of the indicated phenomena are well-known and have been extensively described by pedagogues or sociologists studying the Polish educational system and its transformations. This concerns such problems as, for instance, the domination of the school’s didactic functions over the upbringing functions and the lack of preparation of teachers for their upbringing mission, the lack of cooperation between the school and parents or the phenomenon of segregating pupils on a socio-economic basis. The specificity of our research consisted in approaching these phenomena from the perspective of a poor pupil’s needs. In this perspective, the generally known weaknesses of the Polish school take on a significantly greater weight.
The specificity and difficulties in countering the poverty of children and adolescents come from the fact that twofold actions should be simultaneously undertaken: on the one hand, deficiencies should be eliminated or alleviated and support in satisfying the most basic needs should be provided, and on the other hand, opportunities for the future should be provided. And yet, it seems that activities undertaken by schools in relation to poor pupils are most often temporary, ad hoc ones and consist in eliminating the current deficiencies, e.g. offering meals or providing help in exceptional circumstances. Much less attention is given to long-term activities, such as supporting the learning process, helping the pupils achieving good results in school, creating possibilities and perspectives for the future which would really lead to providing equal opportunities for adolescents.

One of the crucial functions of the school, oriented at children from poverty-stricken milieu is that of offering free meals. The importance of this activity is unquestionable. However, at the same time it seems to be taken for granted that free meals have solved the problem of poverty in schools. Very much importance is also attached to other forms of support, such as lending textbooks to children that cannot afford to buy them, selling textbooks "for ridiculously low prices", as one of the headmasters put it, making it easier to buy cheaper, second-hand textbooks. Thanks to such actions, the teaching staff feels the problem is solved and sees not having textbooks in class as a sign of laziness, bad will or neglect of the pupils and their parents.

Schools provide scholarships or act as intermediaries in the scholarship allocation process. Both social benefit scholarships, as well as educational scholarships sometimes take the form of small (45–50 PLN) allowances granted once (or twice) a year. There are usually many more scholarship applications than possibilities or granting them – generally speaking, the provision of scholarships is by far insufficient.

Long-term actions undertaken by the school include extra-curricular classes whose goal is to broaden the pupils' knowledge. Such classes vary depending on the level of the pupils. "We organise circles of interest for talented students. We have few circles of interest for pupils with learning difficulties, but offer them additional support lessons", said one of the headmasters. The name of these activities already stigmatises certain pupils. Furthermore, it must be stated that not many such additional support activities are offered and schools that are empty in the afternoons do not fulfil their social and cultural functions within the local community. Moreover, the offer is usually inaccessible for pupils who live far from the school.

Teachers, headmasters and school pedagogues declare they attach much importance to the activities consisting in upbringing the pupils – mentally strengthening them, building their self-esteem, self-confidence and hope for the future – all of this being mentally strengthening them, building their self-esteem, self-confidence and hope for the future – all of this being. Teachers make sure that help is provided in full discretion, providing support adapted by the school. Teachers lack preparation for working with the pupils from poor and marginalised milieus and are often unaware of the stigmatising character of certain forms of support, such as, for example, free school meals and additional lessons. Teachers make sure that help is provided in full discretion, and yet children who are entitled to benefit from support do not want to eat the free meals, as they are called abusive names ("welfare children") by their peers.

Poor pupils leave school with a "school stigma syndrome" connected to their origin (Kwieciński 1995, p. 172). According to experts this is a phenomenon intrinsically linked to the school and its hidden curriculum (Dudzikowa 2004). Stigmatisation may be particularly destructive for the educational aspirations of the pupil, for his/her further education or even for the rest of his/her life.

Social inequalities in the school are expressed by the phenomenon of segregation. Segregation takes different forms: e.g. separate classes for "better" and "worse" students, paid meals differing from those that are given for free, school trips only attainable for children from more wealthy families etc. Segregation may be conscious or subconscious, overt or concealed and made using different criteria: classes are selected according to the students' level of knowledge, results and achievements or their place of residence (pupils living in the vicinity of the school and those travelling to school), as well as others. The socio-economic diversity of the families is behind the different forms of segregation. The negative or even destructive educational function of such practices, especially those applied unconsciously, is not noticed.

It must be added, however, that our study shows these phenomena are undergoing significant changes: schools seem to be learning – some of them are gradually retreating from segregation practices as a result of their negative experiences (this is referred to as the educational failure caused by segregation) or recommendations coming from outside the school. This retreat is sometimes accompanied by a feeling of discontent, as segregation is seen by some as a simple way of solving difficult school problems.

The studied lower secondary schools have a good or sometimes very good infrastructure: workshops, computer halls, modern gyms or even swimming pools. They have well-educated teaching staff and opportunities that they did not have before, opportunities that underfinanced rural schools still do not have. These lower secondary schools are definitely the proof of a civilisation leap that took place in the educational system. However, due to the transport barrier not all pupils can make full use this impressive infrastructure. As a representative of a non-governmental organisation dealing with disabled adolescents in one of the studied locations said "The provision of equal opportunities does not only consist in equipping schools in computer halls, but also in offering access to them. And at present not everyone has this access". Providing equal opportunities and ensuring social integration in lower secondary schools with pupils from rural areas will be possible once the problem of transport to and from school is solved.

Skipping classes is the main problem in all the studied schools. In part, this results from the home or money-earning obligations of the pupils and in part it is a normal practice for the phenomena encompassed by the category of "poverty counterculture": running away (skipping classes) is one of the more typical survival strategies in an alien, oppressive school. In extreme circumstances it may lead to quitting school altogether. Children that are worse dressed, use photocopied textbooks, and do not bring sandwiches to school feel ashamed and afraid, they avoid going to school.

The backyard, the street and other public places may become an alternative to school [...]. This is where it is possible to recreate and create the poverty counterculture, outside the limitations school imposes and outside the compromise it requires (Jacyno 1987, p. 113). Meanwhile, the most important institution which the school
HOUSING POLICY TOWARDS POVERTY AND SOCIAL EXCLUSION*

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Housing Department in Warsaw

16 years of social and economic transformation required making an evaluation and answering the following question: If and how did the changes in the Polish housing policy influence the housing situation of the part of population having lower income, and what where the effects of the applied policy on the housing poverty?

The analysis and evaluation covered legal, socioeconomic, as well as architectonic and spatial housing solutions on the level of the country and mainly urban gminas. Due to the scale of the housing problems in cities, a particular attention was paid to the housing issue, including: housing construction, housing resources management, changes in housing situation of the urban population in the period of social and economic transformation (1989–2005).

The evaluation was carried out on the basis of: legal acts, governmental and parliamentary documents, statistical information, census materials in particular (General National Census 1988 and 2002), information about housing from the housing monitoring conducted by the Institute of Urban Development, information gathered and analysed in relation to the conducted research subjects, concerning dwellings for the poor in the sustainable development of cities, and national instruments of assistance to construction for the poor, literature on the subject, as well as experiences of members of the author team.

The conducted analyses and own research indicate that the economic and social transformation was reflected in housing by, among others, an increased impact of factors marginalising weaker social groups, and, in particular, a decrease of accessibility of dwellings for this group. The subsequent changes in the direction of state housing policy did not alleviate the effects of transformation in this regard. In its initial period (years 1990–1994), dwellings were perceived in market categories, as it was considered that the best method to solve the housing problem is to own a dwelling.

The support for the construction of co-op dwellings was withdrawn; the remissions of parts of credits were eliminated; variable interest rates on housing loans were introduced.

* Elaborated on the basis of Housing policy towards poverty and social exclusion: Hanka Zaniewska – head of project, Maciej Czarnecki, Lucyna Deniszczuk, Jan Korniłowicz, Maria Thiel, Tomasz Żelawski, Institute of Urban Development in Krakow – Housing Department in Warsaw.
Ownership transformations and management of housing resources in new economic conditions became the priority.

Decentralisation of the country’s governance system was reflected in the transfer of numerous competencies to the local level, including the realisation of the state housing policy. It was assumed that the possibility to satisfy housing needs results from local conditions.

The 1994 was the year of changes in rent policy. Low, centrally determined rents were replaced by economic rents determined by gminas. At the same time the system of housing allowances constituting social protection for poor households was introduced, compensating the increase of rents and housing charges. Unfortunately, the increase of rents did not result in the awaited improvement of the state of resources. And the percent of people drawing housing allowances in Poland (does not exceed 10%) is lower than in other European countries (15–20% of households benefit from allowances).

After 1995, the social housing construction was launched. The development of social tenement housing was seen as the chance to improve the housing situation in Poland, but the lack of sufficient means in the National Housing Fund did not allow building the expected number of dwellings, and those that were built are inaccessible for poor social groups. The government policy focused on the protection of tenants’ rights, development of ownership housing construction and thermonetisation activities, but no sooner than in the years 2002–2005 came the of the majority of local self-governments is the reason why the local condition.

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<table>
<thead>
<tr>
<th>Criteria</th>
<th>Features</th>
<th>Functional and spatial</th>
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<tbody>
<tr>
<td>Housing conditions</td>
<td>One household composed of several members</td>
<td>Two or more households</td>
</tr>
<tr>
<td></td>
<td>Moral and technical wear and tear of the building</td>
<td>Lack of own financial resources</td>
</tr>
<tr>
<td></td>
<td>Purchasing</td>
<td>Lack of creditworthiness</td>
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<td></td>
<td>Supporting</td>
<td>Lack of means or insufficient means for rent and housing charges</td>
</tr>
</tbody>
</table>

Source: Own study.

<table>
<thead>
<tr>
<th>Participants</th>
<th>Types of actions</th>
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<tbody>
<tr>
<td>State</td>
<td>Legal regulations, co-financing from the budget of special-purpose programmes</td>
</tr>
<tr>
<td>Municipalite</td>
<td>Creating local law, elaboration of local strategies and programmes, coordination of initiatives of local partners, enlargement of resources (construction, adaptation, renovation), granting housing allowances according to given criteria, granting right to a communal, including social, dwelling.</td>
</tr>
<tr>
<td>Non-governmental organisations:</td>
<td>Organisation of help for the excluded and the homeless (night shelters, houses for the homeless etc.)</td>
</tr>
<tr>
<td>– charity</td>
<td>promotion of the idea and counselling</td>
</tr>
<tr>
<td>– other, e.g. unions of cities</td>
<td>participation in financing, constructing and supporting dwellings</td>
</tr>
<tr>
<td>Owners:</td>
<td></td>
</tr>
<tr>
<td>– construction organisations</td>
<td>in perspective – participation in constructing and supporting with the appropriate fiscal aid</td>
</tr>
<tr>
<td>– non-profit (Social Housing Associations)</td>
<td>management of housing resources enabling social integration (including exchanges of dwellings)</td>
</tr>
<tr>
<td>– housing cooperatives</td>
<td>material liability for maintaining housing resources</td>
</tr>
<tr>
<td>– natural persons</td>
<td></td>
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<tr>
<td>– managers (different forms)</td>
<td></td>
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Source: Own study.
The research of the Institute of Urban Development conducted in the years 2004–2006 indicate that in Poland there is shortage of 300 thousand communal dwellings, and c.a. 130 thousand families wait for social dwellings. This demand is to be satisfied by gminas.

Due to such scale of the problem the assumption that gminas will create conditions to satisfy the housing needs of the community is difficult to realise, mainly for the following reasons:

- lack of the necessary financial means in local budgets,
- insufficiently developed ability to secure financing from different sources and to search for different organisational solutions in order to satisfy the housing needs of the poor members of the community,
- obligation to deliver social rent dwellings to every gmina’s inhabitant, no matter if they lived in communal resources or other, e.g. co-op or ownership dwellings.

The policy of gminas towards the creation of social dwellings resources they are obliged to realise is various. The most often gminas undertake single, ad-hoc actions. Rarer are the complex housing programs, to the realisation of which gminas are bound by virtue of the law. The ad-hoc actions on the level of gmina result from similar or only pilot actions on the national level.

Wider participation of public and private partners would strengthen the possibility to fulfill the criteria of sustainable development on the level of a housing estate, a building or a dwelling where the poor live. It is however related to the cohesion of the social, integration, economic and spatial policies. Gminas must not be left alone in searching for solution to the housing problems of the poor members of their community. It is necessary to continue the actions already undertaken by the state and to include other entities, what would allow relieving the housing problems of the poor members of the community.

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Independently on the issue of the volume of social dwellings resources, an important question is the quality of the housing environment, which, without actions aiming at revalorising it, may lead to creation of areas of marginalisation and social exclusion.

Enlarging the criteria of housing conditions quality assessment by forms of housing development, its location and town-planning solutions, we can indicate the areas where negative features concentrate, being the evidence of low quality of housing environment and, in extreme situations, of housing poverty. These areas, as well as the phenomena of housing poverty cumulate mainly in cities in the following resources:

- communal resources that, however, are not numerous (c.a. 15% of urban resources); they are the oldest and have the smallest dwellings.
- in part (30%) of co-operative resources with overpopulated dwellings, the share of which is lower than in gminas but the number of which is much higher, built in industrial technologies, e.g. large panel,
- morally and technically worn and torn private rent resources, covered by a particular mode of lease, where low rents do not allow the proper maintenance of the building.

Outside cities, the areas having particular social and economic problems are mainly the areas that used to belong to state-owned farms, where the system of colonisation (housing estates near the farms) was related to the system of agriculture organisation.

From own studies and the literature on the subject it follows that solving the problem of poverty and social exclusion consists not only in providing roof over the head of homeless (some of them are homeless out of their own choice) but also (and maybe this is the most important) countering homelessness and helping those who live in state of housing poverty and try not to land on the street.

In the opinion of the European specialists the Union should continue to underline the importance of the appropriate and suitable dwelling as the key to reduce the scope of social exclusion (...)7.

1 There were earlier models of legislative solutions adopted in Poland after 1989. Already in 1916, the authorities tried to alleviate difficult conditions (being the result of World War I) of life of city inhabitants, and, in particular, of people renting flats and remaining unemployed. It was reflected in an act on tenants’ eviction suspension (Journal of Laws of the Kingdom of Poland no. 8 of 16 July 1918, item 17) and act on temporary protection of tenants (Journal of Laws of the Kingdom of Poland no. 10 of 4 September 1918).
3 How to help people excluded from decent housing Experiences from nine European cities, results of the Project entitled Integrated forms of cooperation in housing stock policy for housing provision for risk groups, COOP, consortium, November 2005.
6 see footnote 1.

FIGHTING POVERTY AND SOCIAL EXCLUSION AS PART OF POLICIES IMPLEMENTED AT THE LOCAL GOVERNMENT LEVEL

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leading conditions and for adjusting the forms of activity used by social policy institutions to the local specifics. The scale of the local environment is the most appropriate one for assessing the needs in the areas of health protection, organisation of the educational system, employment services and social care for the unemployed, social care and creation of conditions for activities of non-governmental organisations and self-help groups. That scale is also the most appropriate one for taking actions aimed to prevent social exclusion and to combat that process, where it
The study was aimed to assess the activities of local government towards prevention and fighting of poverty and social exclusion. The most important research issues were specified as:
- Defining the scope of tasks (especially the obligatory ones) of local government institutions in the context of preventing and fighting social exclusion;
- Examining the awareness of local government regarding the problems of social exclusion;
- Examining the mutual relations between the particular actors (institutions) deciding on local policies and assessing their competencies;
- Analysing local programs of preventing or fighting social exclusion and poverty;
- Pointing to strenghts and weaknesses of the existing solutions, suggesting possible changes;
- Trying to assess effectiveness of specific programs implemented by local government institutions.

The basis for such a thesis was the field research conducted at earlier times by the Institute of Social Economics at SGH, connected with poverty, local social policy and living conditions of the population groups presently in a difficult living position. The analysis of the research project results gave the basis to formulate two auxiliary theses:
1. Activities of local government, despite the multifaceted nature of social exclusion that is emphasized in theoretical works, focus on economic exclusion and poverty.
2. Lack of activities towards preventing and fighting social exclusion leads to the creation of an underclass and has negative impact on the local community.

The soundness of research questions and hypotheses depends – among others – on the precise definition of social exclusion. The authors adopted – after NSIS – such a definition of social exclusion which perceives it as a situation that prevents – or seriously hinders – an individual or a group from a legal performance of social roles, taking advantage of public goods and of social infrastructure, gathering resources and achieving income in a dignified way.

Methods used in preparing the report included the method of analysing source materials. While that method was being used, a map of problems was developed, additionally verified at the pilot stage. That map included those problems that required particularly careful discussion at later stages of the project. The main results of the empirical study were obtained during interviews in several communes in Poland. The final stage of the research project involved analysing the contents and tasks resulting from local strategies of development and of resolving social problems.

As part of the following stage of the study, strategy of social problems solving was analysed at 16 selected communes. These were:
- rural communes: Trzebownisko, Telatyn, Goleśzów, Pabianice;
- urban-rural communes: Pieniężno, Sokółka, Gryflno, Mordy;
- urban communes: Oława, Aleksandrów Kujawski, Chojnice, Zakopane;
- urban communes with the „powiat” rights: Poznań, Kielce, Opole, Zielona Góra.

The material gathered is obviously not of a fully representative nature and does not allow to make fully substantiated general conclusions regarding the whole country. It seems, however, that an extended initial analysis of the material found, as well as the highly diversified nature of the communes studied give us grounds to confidently refer the findings to the situation of the majority of Polish communes, as well as being the point of departure for further, more detailed analyses.

The most important gaps in the collected material include a highly subjective type of some parts, especially those pertaining to the relations between specific actors of local policies. At the same time, one should stress that statistical data on the poor and excluded – or, taking a broader perspective – on those who

<table>
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<tr>
<th>Name of the commune</th>
<th>Characteristic features</th>
<th>Population</th>
<th>Budget</th>
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<tbody>
<tr>
<td>Sokółka (Podlaskie)</td>
<td>An urban-rural commune with a high level of social activity</td>
<td>18,945</td>
<td>39,474,123 PLN</td>
</tr>
<tr>
<td>Dobra (Malopolska)</td>
<td>A rural commune of average socio-economic activity</td>
<td>9,328</td>
<td>15,614,985 PLN</td>
</tr>
<tr>
<td>Nowe Skalmierzycy (Wielkopolska)</td>
<td>An urban-rural commune with a high level of economic activity</td>
<td>15,191</td>
<td>24,876,509 PLN</td>
</tr>
<tr>
<td>Subkowy (Pomorskie)</td>
<td>A rural commune of average socio-economic activity level</td>
<td>5,214</td>
<td>10,173,847 PLN</td>
</tr>
<tr>
<td>Lysomice (Kujawsko- -Pomorskie)</td>
<td>A rural commune of average socio-economic activity level</td>
<td>8,325</td>
<td>13,860,127 PLN</td>
</tr>
</tbody>
</table>

Source: Poprietary research; population data (actual place of residence as of 31 Dec 2005) and commune income in PLN (total income of the commune’s budget, lower line – own income of the commune) were based on the regional data base of the Central Statistical Office (GUS) for 2005 (http://www.stat.gov.pl/bdr/bdrap.strona.indeks).
need assistance and support from local community and local authorities – are in principle limited to the data of the social care centre operating locally. Thus, while one can venture certain analyses devoted to the spiral of poverty and exclusion, it is increasingly difficult to find any data on those whose situation improved, or those who keep balancing on the verge of exclusion. This strengthens our belief that activities of local government focus on fighting, rather than preventing, social exclusion, and that those activities help the people in crisis to “stay afloat”, and stop their decline, rather than helping to combat the situation and leave the group of socially excluded families for good.

CONCLUSIONS AND RECOMMENDATIONS

Findings of the research have confirmed the main thesis that was originally adopted. Activities of the local government in the area of preventing and fighting social exclusion and poverty should be regarded as not very effective. This is mainly caused by the concentration of resources on helping those in deep exclusion. At the same time, the scope of assistance per an excluded person and their family, usually does not allow them for a meaningful improvement of their situation and for leaving the excluded zone, and is just enough to prevent the further decline. Such a situation could be improved either by broadening the scope of assistance, or by faster and less expensive intervention at an earlier phase of exclusion, together with preventing the entire process.

One of the auxiliary theses was also verified positively, stating that lack of activities towards prevention and fighting the social exclusion leads to creation of an underclass and has a negative influence on the entire local community. This happens when social problems pertain to a bigger part of the community, as is the case with villages populated by employees of the former state farms. The other auxiliary thesis, saying that local government activities concentrate on economic exclusion and poverty, was partly confirmed. The reason is that the main unit offering assistance to the excluded ones, and coordinating social policy in the communes, are usually the local Social Care Centres (OPS). However, local government employees tend to appreciate the social dimension of exclusion, too, and the need to social work with those excluded, in order to change their life attitudes.

It has also turned out that social exclusion, while not yielding easily to a very detailed definition, is rather negatively coloured in the perception of Polish local government workers, and is quite close to the expressions of “social margin” (margines społeczny) or “social pathology” (patologia). This perception is also relative, since the poorer and the more homogenous a commune is, the higher is the level of objective deprivation among those perceived as excluded, and the bigger is the hiatus between the notions of exclusion and poverty. Such conclusions may follow from the sizes of the communes studied, since in smaller communities exclusion is largely perceived as an individual problem and pertains also to the relations with others – i.e. to the social dimension – and the most common example of the excluded ones are alcoholics. In case of bigger communes, respondents more frequently pointed to external factors of exclusion, non-dependent on the individual – such as the high national unemployment rate, and the “excluded” term comprised more categories of people, e.g. senior citizens.

At the same time, the divergence between the official and the colloquial functioning of the “socially excluded” term may influence the practical implementation of the local strategies for resolving social problems. Local authorities and citizens are definitely more inclined to help the poor, if they found themselves in the difficult living conditions (according to respondents) “not of their own fault”, and thus – are not regarded as excluded3. This pertains mainly to families with a high number of children. At the same time, local government units are quite reluctant to provide budgetary assistance to those perceived as excluded due to their own actions (alcoholism, criminal record, passive attitude to work).

Therefore, integration projects, at least in smaller communes, may be influenced not only by the objectively difficult position of the excluded, but also by the moral assessment of their behaviour.

Analysis of local government activities allows to state that the biggest impact by far on local government activity towards social exclusion is exerted by central administration. Where there is no appropriate law, procedures and financial resources to follow, there is usually lack of additional programs. Statutory activities of local government are usually complemented by local initiatives, dependent mainly on the good will and eagerness of commune’s officials (as initiators or supporters) and of the residents themselves – with the presence of local leaders and non-governmental organisations. A key role is played here by the wójt or burmistrz of the commune, and by the management | and employees of the local social care centre.

The projects implemented by the commune tend to be targeted at particular social problems, e.g. fighting alcoholism as part of the Law on education in sobriety and counteracting alcoholism. It is less frequent that they approach the social exclusion area in a more complex way. Unfortunately, as most objectives of local government activities is only defined in a very general way and there are no specific indicators quoted that would allow for assessment of the level of implementation success, it is very difficult to evaluate the actual effectiveness of the activities.

Lack of a holistic view at the problems of social exclusion, perceiving social policy and diagnosing social problems through the social assistance provided in the communes under study, results mainly from the lack of appropriate personnel and from the fact that specialists competent in social policy usually work in the very OPS centres. The commune authorities, on the other hand, are much more interested in the economic and infrastructural development of the area, and less so – in supporting the local capital of the citizens.

In the opinion of respondents, the most effective method of combating social exclusion is economic development of the commune, which increases its own income (allowing to carry out anti-exclusion programs), lowers the burdens related to self-financing of social services, and allows those excluded to obtain own income.

In this situation, the following recommendations should be formulated towards local government bodies:

1) secure appropriate professional qualifications for the employees of the communal/municipal office responsible for implementation of social tasks (incl. fighting social exclusion, cooperation with the social care centre, health promotion and public health issues), so as to facilitate the situation whereby signals of the risk of exclusion, or of the growing poverty of the population, reach the local government authorities; in smaller communes it seems key that support of specialised companies and research centres should be used, as well as experience and documentation of powiat-based, voivodship and central authorities, including the use of the higher-level strategies when building own plans for social development and for solving social problems;

2) develop a multi-faceted social diagnosis, responding – among others – to the questions on the scale and forms of social exclusion in the particular area. Such a diagnosis should also allow to look for responses to the question of the causes of poverty and exclusion in the local area;

3) define local anti-exclusion programs and indicate the goals that can be achieved by including the commune in implementation of the regional and national strategies; the programs should comprise a set of indicators allowing for monitoring and defining effectiveness achieved;

4) secure participation of non-governmental organisations in implementing the tasks of the anti-exclusion and anti-poverty policies; secure an agreement of social and political forces within the commune as to the goals and programs of fighting poverty and social exclusion, independently on their implementation time.
perspectives (anti-exclusion programs usually call for a schedule longer than a single term of local government in office); 5) gain support of the local public opinion in co-operation with respect to fighting exclusion and gain social acceptance to direct an appropriate part of material resources to implement the tasks and programs; 6) secure (as far as possible) external financial support for implementation of the tasks set, including that from EU funds; while considering the fixed costs generated by possible new institutions of social type; 7) take care of systematic information to the local public opinion regarding results of the actions taken; 8) in case of bigger programs – secure consultations with the academic sector, in order to work out the best possible operating methods.

1 According to J. Szczepański, an institution represents a set of material facilities and means of activity that allows some individuals to perform public functions aimed to satisfy needs or to regulate behaviour of the group members. Components of each institutions are the ways of behaving accepted and created by the group. Existence of the institution is based on social permission, involving – among others – readiness to accept certain burdens related to the functioning of the institution (Szczepański 1968).

2 The local scale is understood here as the scale of the borough or commune, even though the majority of practical activities related to satisfying individual and collective needs takes place at the level of commune (gmina). The situation of local social policy on the both levels mentioned results from the need to rationalise the social policy expenses and to optimise its structures. It seems that the scale of a borough (powiat) is particularly appropriate for formulating a complete diagnosis of social problems and pointing to the ways of solving them with effective use of social infrastructure and with appropriate engagement of financial and material resources. Those social policy bodies that cover the whole borough tend to cater to more specialist needs, usually implementing tasks addressed to specific groups of the population. The selection criteria include the higher level of professionalism of services provided (e.g. upper-secondary education or health services provided at a stationary care centre) or economic criteria, related to the unit cost of services provided in the scale of the borough. In case of specialist services that require higher qualifications of the personnel, and usually better-equipped centres, such a cost would be incomparably higher if provided for each commune separately. The local scale, understood as the powiat for more specialist activities and gmina offering basic services, is also the scene of activities by non-governmental organisations and of the volunteers’ movement. 3 At least not in the sense of exclusion from the local community. 4 It is worth noting here that the problem of absorbing the EU resources in communes, often voiced in the media, may be connected not as much with lack of personnel and supervisory staff for EU projects (communes either have such specialist staff or know the external companies that can provide relevant support), as with lack of the necessary own financial input. Over the recent years, Polish communes have taken loans for the development of local infrastructure, and have few possibilities to take further loans, which – with low proprietary income of poorer communes, may often determine a limited scope of investments.

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ANALYSIS OF EFFECTIVENESS OF COOPERATION BETWEEN THE STATE AND NON-GOVERNMENT ORGANISATIONS IN COMBATING POVERTY AND SOCIAL EXCLUSION

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TRADITIONS OF COOPERATION

The currently widely discussed, criticised or promoted, cooperation of NGOs with local self-governments and public institutions has, initially not been a priority during the transformation period. The self-government system that emerged after 1989 did not anticipate cooperation with NGOs. Social actors active at that time generally introduced their own members to the local authorities or applied the individual survival strategy, staking, chiefly, on independence (which also was an effect of “children’s disease” – reluctance to cooperation and looking for partners). Distrust prevailed both on the side of the budding local self-government and the emerging social organisations.

The individualisation of contacts between the NGOs-public or self-government partners was not conducive to the process
of federalisation of the social organisations sector. The problem observed for many years (but strongly felt also today), is the lack of a strong partnership inside the third sector. The initiatives visible in this field are guided by the principle of arbitration. The representative actors are not created according to the corporate principles but rather according to the federative ones (e.g. National Council of Non-Government Organisations, Forum of Polish Foundations). It seems that the federalisation is forced out by the external factors (e.g. possibilities of acquiring European funds) rather than the processes connected with the functioning of the civic society (Frączak).

A better climate emerged only in the process of experiences, through common actions and programmes (more or less since 1993). The lack of legal normalisation did not make the case easier (the 1994 report of the Supreme Chamber of Control (NIK) entitled "Information about the results of control of managing assets for the self-government institutions of various levels using at least three means and Batory Foundation had a motivating character). The initial frameworks and patterns of such cooperation emerged in Gdynia where the "Programme of cooperation between Gdynia Municipality and non-government organisations" was agreed in 1994. This programme was legally introduced by the City Council. This path of cooperation successively developed in two directions – more axiological one, where the value of cooperation proper was underscored, and the task-related one, where concrete thinking referred to budgetary provisions predominated. Another way of cooperation preferred at that time were the agreements signed between town managements and social organisations (pilot forms functioned in Kraków and Lublin). At the same time, certain distortions started to occur because social pacts started to be duplicated in an automatic way1.

Towards the end of the 1990s, an increasing number of local self-governments (The Union of Polish Towns, Local Self-governments Congress of the Polish Republic) started to perceive the importance and profits from mutual cooperation. Ever more frequently underscored was the necessity of introducing legislative solutions normalising such cooperation. Paradoxically enough, after 1998 the situation of mutual cooperation programmes abruptly deteriorated (owing to the new law on public finance). Its provisions were disadvantageous, and, moreover, it gave many local self-governments a pretext to limit the financing of the organisations within the framework of the already undertaken actions. The amendment of the law in 1999 improved certain shortcomings but social losses (fade-out of cooperation within the framework of common programmes), were irreparable (Frączak 2004, p. 37–46).

### Table 1. Possible channels of cooperation between social organisations and administration

<table>
<thead>
<tr>
<th>Description</th>
<th>Mechanism</th>
<th>Legal source</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public-social partnership</td>
<td>Entrusting public tasks in the form of support or entrusting their execution primarily through an open competition of offers organised by the administration</td>
<td>Law on public use and volunteers (DzU No. 96, item 873 of 2003)</td>
<td>This partnership contains three elements – mutual information about the planned directions of activity, consultation of legal acts, creation of common teams of advisory or consultative character. The area of potential partnership is defined administratively (public use spheres contained in the public use law).</td>
</tr>
<tr>
<td>Possibility of obtaining subsidy</td>
<td>Subjects outside the public finance and non-profit sector can receive subsidies from the local self-government budget for public purposes connected with the implementation of the tasks of this entity</td>
<td>Law on public finances (DzU No. 15, item 148 of 2003)</td>
<td>The ordering of a task and granting subsidy occurs on the basis of a contract concluded between the local self-government and social organisation (known as art. 118).</td>
</tr>
<tr>
<td>Public-private partnership</td>
<td>Contract-based cooperation between a public subject and private partner serving the implementation of a public task.</td>
<td>Law on public-private partnership (DzU No. 169, item 1420 of 2005)</td>
<td>A non-government organisation is one of the possible partners here (next to employers, church, denominational unions and foreign subjects). Similarly, government and self-government is also one of the possible parties to an agreement.</td>
</tr>
<tr>
<td>Social assistance</td>
<td>Ordering tasks in the mood of the law on social assistance through an open competition of offers covering the financing or co-financing of a given task</td>
<td>Law on social assistance (DzU No. 64, item 593 of 2004 with later amendments)</td>
<td>Not only non-government but also church organisations can apply for the implementation of a given task. Inviting entries for the competition can be done by a social assistance institution and the inviting of the &quot;offer&quot; for the implementation of a given task by a non-government organisation (its purposefulness and quality is checked by a social assistance institution – after which it is still necessary to invite entries for offers)2.</td>
</tr>
</tbody>
</table>

Source: Own materials.

The introduction by the law on the operation of public use and voluntariness of provisions, to a certain extent regulating the functioning of social organisations, should be regarded as an important moment in the development of the civic society in Poland. The definition in it of the very notion of a non-government organisation in a broader social context, is an important fact. According to the law on public use, the public use organisations are legal persons or entities having no legal personality created on the basis of legal provisions, including foundations and associations, except for for the political parties, trade unions and employers’ organisations, professional self-governments, foundations based exclusively on the Treasury, are non-government organisations. Other mechanisms stemming from separate regulations are increasingly often used in mutual cooperation between social organisations as well as self-government and public institutions. The self-government organisations cooperate with public and self-government institutions of various levels using at least three other channels (without taking the law on social and professional rehabilitation into account).

**FACTS**

According to the REGON data, 45 891 associations and 7210 foundations were registered in Poland at the end of April 2004. The numbers do not depict the size of the entire third sector, as there is no final agreement as to the components defining it. Many subjects are excluded from it either on the “custom” or context principle (e.g. ascribing them the rather political or lobbying activity rather than social or exclusively hobbyist). In the perspective of a more broadly understood social self-organisation, to the two mentioned figures still added could be: 14 000 voluntary fire brigades, 3524 social organisations (parents’ committees, hunting circles and various social committees), 17 113 trade unions, 5515 economic and professional self-government organisations and various employer unions and political parties. In such a
broad understanding, the tertiary sector could number more than 108 000 subjects (Monitoring 2005, p. 81). If the number of social initiatives and NGOs was to be directly translated into the developmental trends, Poland would certainly be a sports and tourist power and spending leisure time would be one of the main social needs. More than 38% of organisations recognised sport, tourism and recreation as the most important fields of their operation in 2004. Taking into account the organisations, which declare their activity also in this field, next to actions in other areas, their number will grow to 61.7% (also locating this field in the first place). Among the organisations declaring their main field of activity, culture and art came second (11.6%) while education and upbringing placed third (10.3%). Social services and assistance took the fourth place and health protection – fifth (Klon/Jawor association 2005, p. 86–87).

The majority of organisations active in Poland are not affluent. In 2003, the annual income of 79% of them did not exceed PLN 100 000. Visible in their operations are troubles connected with an insignificant degree of engagement of citizens. In 1990, in their activities engaged were 5% of Poles, in 1995 – 13%, 1999 saw a drop to 9% an the figure rose to 12.4% in 2002. In 2004, 18.3% of people in Poland declared that they devoted their time to non-government organisations, social groups or religious movements. Of the non-engaged persons, more than half recognised that this was caused primarily by the necessity of caring for their own affairs and more than 40% simply never thought about it. 44.4% of organisations availed themselves of the work of volunteers who were not their members. Most of them benefited from the assistance of up to 10 persons. The number of organisations benefiting from up to 5 volunteers grew between 2002 and 2004, while the number of the ones benefiting from above 60 – decreased.

MAIN SUBJECTS OF SOCIO-PUBLIC PARTNERSHIP

The Ministry of Labour and Social Policy is currently the main coordinator of the operation of non-government organisations in the field of socio-public partnership. This position is connected not so much with any substantial justification, but rather with the affiliation of persons once engaged in work on the legal solutions in this sphere. In this way, not only a certain stereotype of public use emerged but also “government-department” character of its perception. The Ministry of Labour also services the operation of the Public Use Council. The Council is composed (keeping the priorities) of representatives of the tertiary sector, local self-government and public administration. Its members are appointed by a minister responsible for social security (the unsatisfactory character of such location was discussed above). At its inaugural session, the Council was described as an advisory body to the then Minister of Economy, Labour and Social Policy.

A public use organisation may be a non-government organisation, an association of local self-government entities or a subject operating on the basis of provisions regarding the attitude of the State to the Catholic Church and other denominational unions, if it fulfils certain conditions. The organisation: operates in favour of the entire community or a group selected owing to such actions for which there is money, and money is generally in such a way different from the self-government and public institutions. One of the main convictions of NGOs is the belief in their own efficiency and effectiveness of operation. Without negating the possibility of NGOs’ greater effectiveness of action, it should be remarked that they often operate according to the principle of taking such actions for which there is money, and money is generally in self-governments.

The cooperation concerns different priorities on different levels. Social exclusion or problems connected with social assistance are an important element of mutual actions starting from the provincial level down (districts often demonstrate lower activity than provinces). However, even on the commune level, they do not constitute budgetary priorities. Actions connected with sports and culture predominate.

3. All the economic subjects operating in the social space are aware that they have to cooperate in the field of combating social problems. However, local self-governments perceive the NGOs’ poor financial and organisational conditions.
while the organisations look at the local self-governments through the prism of reluctance to share the authority and means. The problem of building up mutual trust and getting to know one another better remains topical.

4. The community of social organisations is not uniform. Visible in it are large chain and strong individual organisations, which have no problems with cooperation with institutions of various levels. Visible are also weak organisations in terms of personnel and finances. Sometimes, "personal unions" occur: persons working in local self-government institutions are at the same time leaders of actions undertaken by social actors. In the situation when social organisations compete among themselves, such organisations are easier to be identified by the self-government institutions. The local self-governments usually prefer such methods of cooperation with the NGOs which help them retain the influence on the current operation of the organisations and put them competitively to the local self-government. It is good, therefore, if such actions have a supplementary or additional character. The "instead" logic is rather unpopular. The mood of subsidising is more often used than that of entrusting tasks.

5. Each local self-government has the duty to draw up annual programmes of cooperation with the NGOs. However, wherever cooperation is not traditional, such programmes are treated as something artificial and are drawn up from the purely formal point of view. On the other hand, wherever such traditions are well-established, they become another tool improving cooperation. Local activity cannot be imposed, even if the imposing institution acts locally.

OWN RESEARCH ASSUMPTIONS

Each time, an action or a programme was the "selected" element. Only after its preliminary analysis the leader and the partners were identified. The selection was based on a number of criteria: (1) the character of activity (preventive or reintegration assistance); (2) the duration of the activity (immediate or limited in time or long-term); (3) group of beneficiaries – persons excluded or threatened with exclusion; (4) the character of the sought-after activity – partnership, that is complex initiatives (no individual or self-aid actions, conducted by one organisation for the exclusive benefit of their members was taken into account); (5) the action visible on the level, on which it emerged (local or above-local), at the moment of carrying out the research, did not remain in the plans and intentions of its inventors, but is a realised or already completed initiative; the action has a particularly attention-focusing feature. In research practice, it was either a feature of "actual reality": innovativeness of the idea (even on a modest scale), action in favour of a specific group of beneficiaries (threatened with social exclusion), actions on a major scale (which did not preclude innovativeness) or a "regulative reality" feature (especially of innovative character and, thereby, effective solutions for mutual cooperation between various subjects).

In each case, the research was composed of a one-day research visit during which an interview with the social and/or institutional partner was held. If there was no possibility of having talks with two partners, a leader was selected. In this context, not all partnerships have been investigated equally. Wherever possible, materials and documents concerning a given initiative (reports, information materials) were collected. During each research visit a uniform form was used containing dispositions to the in-depth interview.

In order to create the typology of the investigated initiatives, their general assumptions have been worked out (types of cooperation within the framework of public and social partnership).

Table 2. Types of cooperation within the framework of public-social partnership

<table>
<thead>
<tr>
<th>Type A – Public Use</th>
<th>Type B – Social Economy</th>
<th>Type C – Small organisations</th>
<th>Type D – &quot;Paternalised&quot;</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main social actors</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Organisations having public use status</td>
<td>Social enterprises (social employment), cooperatives and para-banking institutions</td>
<td>Chiefly locally operating and self-aid associations</td>
<td>Self-government institutions, or lower level public institutions (WUP and PUP) and social organisations (financially and personally dependent on the local self-government).</td>
</tr>
<tr>
<td>Main legal instruments</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Law on public use and volunteers operation</td>
<td>Law on social employment, Law on employment promotion and labour market institutions</td>
<td>Law on associations</td>
<td>Law on public finance, Law on public-private partnership, Law on social assistance</td>
</tr>
<tr>
<td>Institutional partners</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Central public, provincial as well as self-governments of the three levels and other social and infrastructural organisations</td>
<td>Central public, provincial as well as self-governments of the three levels and other social and infrastructural organisations together with the private sector</td>
<td>Commune or district-level self-governments</td>
<td>Self-governments of provincial, district or commune level</td>
</tr>
</tbody>
</table>

Discrimination of organisations having no public use status by the institutional partners. Instrumental treatment of the public use partners.

Carrying out profile-oriented activity under the pretext of integration activity. Specialisation in acquiring public means with the domination of the "from-top" creation of social economy.

Financial and organisational weakness, temporariness of actions. Disregard of actors of this type while preparing local development strategies.

Emergence of pseudo-social initiatives (lack of authentic leaders) and artificial supplementation of institutional activity.

Source: Own materials.

INVESTIGATED PARTNERSHIPS/PROGRAMMES AND THEIR FEATURES

As it was mentioned earlier, eight undertakings and partnerships of various types have been selected for the investigation. The table below lists them together with the reference to the selection features. The type A (being limited exclusively to public use organisations) seldom appears in the research. In practice, a number of the investigated organisations have this status but for the needs of the current project – investigation of partnership – it turned out a fact of secondary importance and did not constitute a criterion for selecting the organisation to be investigated.
CONCLUSIONS FROM OWN RESEARCH

1. Most investigated initiatives and partnerships acted on an insignificant scale. This, however, cannot lead to a conclusion that expensive models of aid for entities are being built. There are problems with the recruitment of the beneficiaries for aid programmes. Two tendencies have been manifested here – either the programme is “generally accessible” or in order to enter it rigorous criteria must be fulfilled. In the first case, one can speak about greater chances for operation for a sizeable number of persons. In practice, also here visible was the lack of beneficiaries and lowered effectiveness of actions towards the applicants. In the second case, there was a severe selection before entering the programme, which greatly improves effectiveness, but lowers the scale of activity.

2. Several facts can be pointed out: first, not all the excluded persons intend to take part in the integration programmes. Second, the majority of even effective integration programmes from the point of view of the “main stream of social life” do not offer integration on an excessively high level (the social status of the integrated beneficiaries is not high). Third, in numerous communities once depending on the assistance actions the emigration activity is being observed. The most active people leave the country to work abroad either before taking part in some programmes or immediately after concluding their activity in them. There appears the problem of stratification of problem groups. The potential beneficiaries for whom the programmes are created do not want to take part in them because they find other, more attractive offers. Those who remain are beneficiaries not covered by the programmes because their chances for integration success are slim.

3. Most of the investigated actions are interesting initiatives in the aspect of a certain idea, but they are not necessarily innovative as far as their implementation is concerned. Rare are cases of finding initiatives engaging various partners in a hitherto unapplied way (e.g., various local self-government offices or cooperation between social actors and business entities). There is a lack of partnerships able to vitally change the schemes of bureaucratic activity. Borders between offices are often impossible to be crossed by even the representatives of various institutions and not only the social organisations. Sometimes, visible is also the lack of cooperation between the very social organisations operating in favour of, for example, the same category of beneficiaries. Initiatives undertaken in favour of the selected beneficiaries are usually located in some local communities. Most often than not, neither the beneficiaries, nor the actions undertaken in their favour find support or continuation within the framework of a given community. Except for few examples, there are practically no programmes within the framework of which the NGOs operating in a certain environment would like to interest with their activity not only the local authorities but also the inhabitants. This, from the point of view of the integration process, seems to be a substantial shortcoming.

4. Actions last for a short-period. Most of them are based on external funding, often from the European Union. Their use is always of time-related character having the “start-up” aid as the idea. In most of the investigated cases they did not contribute to the creation of opportunities for long-term actions. Even the implemented programmes, excellently considered and extremely useful, do not find their continuation because of the lack of alternative sources of financing. Having used up the external sources, neither the organisations nor the local self-governments continue such programmes seeking new means for undertaking new actions. In other words, a second edition of a given activity is a rarity and the continuation is outright unparalleled. Sometimes one can even suspect that the programmes are a derivative of the accessible means. The hitherto philosophy of using the external means should, perhaps, be based on different assumptions –
the priority should not be their use (which does mean that this is an insignificant problem) but their function of stimulating local activeness (today forgotten altogether, as it seems).

5. Many programmes lack their continuation (for example psychological-personal support activity is not followed by training activity and actions aimed at cultural integrity) or barriers seen in their social and institutional environment will anyway not allow the beneficiaries to use them in full (a single person may be aided psychologically and trained but nobody in his current environment expects anything from him and there is practically no chance for changing the environment). Most programmes are directed to the beneficiaries. It seems, however, that no less problems are hidden in the environment in which they are staying.

6. Actions and partnerships inspired by the public institutions, big and, to a certain extend bureaucratised, usually do not stimulate local activeness but generate expectations for increased aid. Institutions and entities of lower levels do not feel as co-authors responsible, to a certain extent, for the entity but rather as subcontractors whose responsibility is restricted to the tasks entrusted to them. The expectations formulated “on top” are often differently interpreted “on the bottom”. This means a different understanding of the priorities – for example, the steering institutions want to work out model actions to influence a change in the system; institutions and partners from the lower level would like to extend effective aid to the biggest possible population of beneficiaries. This surely is some way of solving a number of problems, but claiming that it contributes to the growth of local social activeness is slightly exaggerated.

7. Bureaucracy can foil each partnership action. There will always be subjects reluctant to some social initiatives. The most effective from this point of view were those social actions, which were aided not so much by the administration but those, which within their frameworks had the “strategic partner”. In our research, it was a representative of an institution, for example a self-government one, who understood the problem which the action concerned and lobbed in his environment in favour of its partnership solution. If in numerous programmes, attention is paid to the need of finding adequate social leaders, one can also speak about some feedback need – finding a good institutional leader or one operating within the framework of some institution (self-government or public), is equally important.

8. On the local self-governments/social organisations verge, the effectiveness of operation is decided by factors, which are difficult to be considered at the planning stage. The main point here is personal animosity, political struggle and personal ambitions. The most visible effect of their real influence is, for example, the time of establishing partnerships between this type of actors – the chance for implementation had those established at the beginning of the term of office. Before the elections there is no chance to take any risky decision. It does not mean, however, that less anonymity in the local communities always has to have a negative overtone. It happens that precisely thanks to the anonymity a number of initiatives in communities once very passive socially were undertaken. These factors cannot be eliminated; they should rather be taken into account while planning the real actions. This is an additional difficulty for the initiators – it is good to recognise not only the problem and the potential beneficiaries, but also have the knowledge as far as the attitudes and behaviours of the potential partners are concerned.

9. Not all local or above-local level institutions have the same activity potential. In our research the PCPR’s turned out to be the weakest structure.

10. More affluent local communities, especially if equipped with social capital, take up numerous initiatives, which can be termed qualitative rather than strictly of aid character. Having no need to solve urgent problems connected with social exclusion and poverty, they develop cultural and recreational activities. In this sense, the division between the affluent and poor communities becomes greater not only as far as the possibilities of taking up some actions are concerned, but also in terms of their distinction. It is impossible to simply compare the activeness of local communities. They often have a totally different character as far as the quality is concerned.

11. It should be noted, however, that the initiatives that could be called qualitative, have also been found in the environments very problematic and neglected in the past. Without negating the thesis about the qualitative stratification of local communities, it should be remarked that much also depends on the local social and self-government leaders. Effective turned out to be especially those activities, where social activeness encountered understanding of the local authorities and where it could reach and activate rural communities. These, in turn, turn out to be (on hypothetical terms) differentiated among themselves in the aspect of social capital.

1 It is impossible to transfer in an automatic way the patterns of NGOs operation from one region to another or apply external patterns in separation from the important actors, which self-governments are. There are numerous premises, especially in the rural community, not to create two groups: social and self-government activist, because they often permeate, sometimes to the advantage of the NGOs. This, however, produces hard to solve dilemmas. Is it a community or a ring, with the feeling of security or with paternalism, with the conflict of interests or with a pattern of good cooperation? The NGOs model functioning in separation from the self-government in a small rural commune does not fit to its functioning unless the alternative sources of financing are found, (Klon/Jawor association 2005, p. 37–38).

2 Visible here is the problem of overlapping of laws. The provisions of the law on social assistance is superior to the law on private-public partnership. This creates complications especially on the level of the province responsible for social assistance. That is why provisions of law on p-p partnership are applied more often or cooperation is generally restricted to that area. Most provincial employees responsible for cooperation with NGOs are employed in departments of social policy (Rymsza, Makowski 2005, p. 114). The second problem can be named as a competence one, because the Public Use Department dealing with the problems stemming from the law on the public use activity was established in the Ministry of Social Policy, which is more closely tied with the law on social assistance (social assistance charity activity are two areas of public use (Expert Discussion 2005, p. 68).

3 The phenomenon is, to a considerable extent, caused by the lack of the reform of the non-government sector as well as the vision and cohesive state policy in relation to the non-government organisations, which, in turn, results in the preservation of the outdated, post-communist structures (i.a. in sports) and the political character of relations between the non-government, government and local self-government sectors (Giński 2004, p. 230).

BIBLIOGRAPHY


INFORMAL SUPPORT NETWORKS
OF THE POPULATION LIVING IN POVERTY
(IN VILLAGES AND SMALL TOWNS)

INTRODUCTION

Social policy in the European Union is based on the principle of subsidiarity which makes support networks be an important provider of resources accumulated in the local community. In Poland their significance seems to be growing recently due to insufficient public finances.

The lacking wages is not compensated by social transfers due to insufficient public finances.

In the last twenty years growing interest in the issue of social support can be observed among psychologists and sociologists but the traditional support network studies go back to the 60’s of the last century. The term “social support” arose in the 70’s of the last century.
20th century and is difficult to define because it is an ambiguous category that is more pragmatic than theoretical. Social support is generally treated as a consequence of a person’s belonging to social networks (Pommerbach 1988 quoted after Sek, Ciesiak 2005, p. 14) and its essence is the function fulfilled by the social network – encompassing informal and formal groups and institutions – in relation to people that are placed in it. The term social network – encompassing informal and formal groups and institutions – in relation to people that are placed in it. The term social support is generally treated as a consequence of a person’s belonging to social networks (Pommerbach 1988 quoted after Sek, Ciesiak 2005, p. 14) and its essence is the function fulfilled by the social network – encompassing informal and formal groups and institutions – in relation to people that are placed in it. The term is defined by the functional content of social relations – as types of aid received by the individuals (House, Kahn 1985 quoted after Phillipson 2004, p. 37), as an interactive process within which various different types of aid are received from the participants of the social network (Bowling et al. 1991, p. 549 quoted after Phillipson 2004, p. 37).

A review of the literature on the subject indicates that the typologies of social support are constructed on the basis of different criteria: subjective criteria, objective criteria and temporal criteria. The following approaches can be distinguished respectively:

1) structural, when the analysis concerns structures providing an individual with assistance as well as individual’s social relations within them. The structures offering social support encompass both:
   - informal networks i.e. family (husband/wife, children, siblings and distant relatives) and non-family (circles of neighbours and friends),
   - formal structures (social services and other institutions and persons trained to deliver support more or less professionally, like psychologists, social workers etc).
   Considering the direction of the assistance provided (who supports whom) rendered support and received support can be distinguished as well as mutual and unidirectional (not mutual) support;
2) functional – when the analysis concerns the content of support that may consist of material aid (financial, property and in the form of services) instrumental, emotional or spiritual assistance;
3) temporal, when the analysis concerns the issue when support was provided:
   - in the past and currently (addressed as received support);
   - in the future (addressed as potential, expected support).

Polish literature providing evidence of informal social support impact on alleviating poverty and preventing social exclusion is scarce. Therefore the study was carried out to explore the significance of informal social networks in satisfying everyday needs of people experiencing poverty. Its main objective was to reveal patterns of support received by people living in poverty from members of their informal social networks. The analysis encompassed all the earlier mentioned aspects of phenomena:

- subjective, i.e. who helps the respondents in meeting their needs and solving their current problems: nobody outside of their own households, members of the family (parents, children, grandparents, siblings, distant relatives), neighbours, friends;
- objective, i.e. which matters the assistance concerns (work, official matters, personal matters, financial, care, maintaining household);
- temporal, encompassing potential support (who could provide the support in the above mentioned matters, if needed) and the received support (by whom and how often the assistance is granted in these matters). Furthermore, assuming that people living in poverty are active participants of the social networks, the matter for study was to whom and how often the respondent provides support, if needed.

The survey was conducted with the use of the questionnaire. Three Gminas of the Lodz Voivodship were selected – two rural Gminas (one in the Vielun Poviat and one in the Laski Poviat) as well as one Gmina (in the Zgierz Poviat) covering both rural and urban areas. The selection of such kind of Gminas was driven by the following:
a sense of the deterioration of their life conditions but only one in 
every three respondents acknowledges themselves to be a poor 
person. The respondents present a low level of optimism. Only 
one in four perceive an opportunity for their material situation to 
 improve in the future. They bind their hopes of leading a more 
affluent life with a change in position on the labour market of one 
of the adult household members or with the children becoming 
 independent.

Social assistance recipients from the studied villages and a 
small town live in a neighbourhood of persons that they perceive as 
similar to themselves in terms of financial conditions. The value of 
the synthetic index measuring the material standing (pauperisation) 
of the social surroundings of the respondent – defined by material 
conditions of the extended family, neighbours and community — 
amounts to 2.93 on a scale of 1–5. It means that they perceive their 
social environment as ‘moderate’; not affluent but also not poor.

Exclusion/integration

Exclusion/integration was measured on the basis of the scope 
and frequency of the social contacts maintained by respondents 
with: members of the family of origin (parents, siblings living 
outside respondent’s household)
– distant relatives,
– friends and neighbours; as well as
– local institutions (Church/Parish, social welfare centre, 
school, Gmina administration).

The results of the study prove that people and families 
supported by social assistance do not live in social isolation. 
A large number of them maintain social contacts with others, 
wherein they are more rooted in informal networks (family, 
relatives, friends, neighbours) than in local institutions. The value 
of synthetic indexes of social inclusion in informal networks and in 
formal institutions measuring frequency of contacts is shaped on 
the level of 2.58 and 1.79 respectively on a scale of 1–5), what 
means moderate frequency of contacts with relatives and friends 
and low frequency of contacts with formal institutions. Though the 
poor inhabitants of village and small-town communities are not 
 socially isolated from community, they maintain contacts most

Table 1. % of respondents who claim that may rely on support 
(from potential support) from particular categories of people in various 
situations put together and in specific situations from the total 
categories of persons

<table>
<thead>
<tr>
<th>Potential Support</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>From particular categories of people in all situations</td>
<td></td>
</tr>
<tr>
<td>– from parents</td>
<td>25.2</td>
</tr>
<tr>
<td>– from children</td>
<td>19.1</td>
</tr>
<tr>
<td>– from grandparents</td>
<td>1.2</td>
</tr>
<tr>
<td>– from siblings</td>
<td>23.4</td>
</tr>
<tr>
<td>– from distant relatives</td>
<td>7.8</td>
</tr>
<tr>
<td>– from neighbours</td>
<td>8.7</td>
</tr>
<tr>
<td>– from friends</td>
<td>19.2</td>
</tr>
</tbody>
</table>
| In various life situations in total from the total categories of 
people | |
| – in work | 16.2 |
| – in official affairs ("Access") | 14.5 |
| – personal problems | 14.2 |
| – money loan | 16.1 |
| – moral support | 15.6 |
| – looking after children/members of the household | 15.1 |
| – maintaining of everyday life (shopping/cleaning) | 13.8 |

Figure 1. Potential support of persons living in poverty within informal circles 
(% of respondents that may turn for help in a given difficult situation to various categories of friends and relatives)

Less than fifteen percent of respondents believe that they could 
receive support in all critical moments in life, mentioned above. 
Parents and siblings are claimed most frequently to be potential 
 helpers while neighbours, distant relatives and grandparents (since 
they were dead) the least frequently. The potential efficacy of the 
various support groups is dependent on the type of situation. The
study has revealed that the welfare recipients would ask parents, siblings and children for advice on personal matters, for a loan and help in everyday household activities (looking after a child, doing the shopping, homework). They would ask their friends however, if the matter concerned work or the necessity of settling some official matters. Neighbours and distant relatives are in fact not taken into account as possible “helpers”. Parents, siblings, children may be helpful to a limited extent in “private” situations and friends and siblings – in “public” affairs.

The conviction of the possibility of turning to somebody for help is not tantamount to actually obtaining it. The studied clients of social welfare realistically assess the possibilities of using the private assistance resources because real support i.e. one that they actually receive within informal networks, is small.

Table 2. Percentage of respondents who receive assistance from different persons in given difficult situations in life

<table>
<thead>
<tr>
<th>Reported assistance in following situations:</th>
<th>Parents N=250</th>
<th>Children N=275</th>
<th>Grandparents N=15</th>
<th>Siblings N=293</th>
<th>Relatives N=306</th>
<th>Neighbours N=318</th>
<th>Friends N=318</th>
<th>Assistance not required N=9</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work</td>
<td>45.2</td>
<td>25.1</td>
<td>16.5</td>
<td>49.8</td>
<td>26.8</td>
<td>27.4</td>
<td>40.3</td>
<td>2.7</td>
</tr>
<tr>
<td>Assistance in official affairs in ’settling’ something</td>
<td>36.6</td>
<td>26.6</td>
<td>14.5</td>
<td>42.7</td>
<td>29.6</td>
<td>30.1</td>
<td>41.1</td>
<td>2.4</td>
</tr>
<tr>
<td>Personal problems</td>
<td>59.2</td>
<td>43.4</td>
<td>20.9</td>
<td>51.7</td>
<td>24.8</td>
<td>21.9</td>
<td>30.0</td>
<td>2.4</td>
</tr>
<tr>
<td>Money loan</td>
<td>59.1</td>
<td>27.3</td>
<td>22.5</td>
<td>49.3</td>
<td>22.7</td>
<td>29.1</td>
<td>30.5</td>
<td>2.4</td>
</tr>
<tr>
<td>Moral support, understanding in problem situations</td>
<td>61.7</td>
<td>45.2</td>
<td>21.1</td>
<td>54.7</td>
<td>24.4</td>
<td>23.5</td>
<td>32.5</td>
<td>2.4</td>
</tr>
<tr>
<td>Looking after children/ill members of family</td>
<td>53.2</td>
<td>33.7</td>
<td>18.4</td>
<td>42.0</td>
<td>18.6</td>
<td>22.3</td>
<td>21.7</td>
<td>3.0</td>
</tr>
<tr>
<td>Maintaining of everyday life (shopping, cleaning)</td>
<td>45.4</td>
<td>43.5</td>
<td>4.2</td>
<td>32.3</td>
<td>14.1</td>
<td>14.9</td>
<td>16.1</td>
<td>3.3</td>
</tr>
</tbody>
</table>

Figure 2. Intensity of support received and rendered (in all analysed situations together) on a scale of never 1 to 5 – always

Support relations of people living in poverty with the members of informal networks are generally symmetrical; the respondents declare themselves to be even more frequently the providers of assistance that the receivers. Assistance is mutual within almost all the distinguished categories of helpers. Only in the case of children is the assistance asymmetrical – respondents declare that they assist children more often than they do benefit from their help.

Independent variables like age, sex, education, work situations and the fact of being an “active”/“inactive” client of social welfare do not differentiate support patterns. The statistically significant differences exist between the inhabitants of a small town and the inhabitants of a village: the first are more often emotionally assisted and the second are more often assisted financially.

CONCLUSION

The conducted analyses authorise a conclusion to be made, namely that informal support networks of people living in poverty in the studied Gminas cannot constitute an alternative to the actions of public services. The support received from the informal networks is not sufficient to be able to get out of poverty. However, the closest social environment protects the less wealthy members of local communities against the social isolation.

1 In sociological and economic studies the assistance relations within formal institutions and informal social networks are analysed also with the aid of such terms as: group transfers, inter-group transfers, intergenerational transfers, in social policy – informal social protection, assistance actions.

2 Thought on the existence and significance of assistance within informal social networks for the population living in poverty is present in psychological research on coping in difficult life situations, in surveys on the ways of maintaining the basic means for life and in research on the functioning of people who live in poverty. The studies to date conducted on the poor population – rarely undertaken from the point of view of its informal social networks – prove that poor people are not passive and devoid of all support. First of all the poor are supported by the family in origin but the scope of this assistance is varied due to the accessibility of the family network of support as well as its “quality”.
The population living in poverty was defined as members of households of welfare recipients (registered in the Gmina social welfare centres).

Social support patterns were established encompassing the analysis of everyday problems of life like: difficulties in work (finding/changing employment for the respondent and his/her closest relatives), dealing with institutions (in official affairs – "access"), having important personal problems, financial problems (borrowing money), looking after children or ill members of the household, maintaining of everyday life (shopping, cleaning) as well as moral support i.e. help in understanding a difficult situation. It was also established whether and how often respondents that are in need of assistance are supported by the various categories of relatives, friends and neighbours in relation to each of the mentioned affairs.

The questions on the questionnaire encompassed four topical books:
1. The characteristics and structure of the respondents' households; 2. The structure of the distant relatives of the respondent (persons that do not belong to his/her household were indicated); 3. Respondent's conditions of life (including his/her psychological state and characteristics of the social surroundings; as well as 4. support relations of respondent's household with members of informal networks).

The financial condition index was calculated as the mean of the values of four partial variables concerning whether and how often (assuming that 1 signifies very often, 2 – often, 3 – sometimes, 4 – rarely, 5 – never) in the household of the respondent there is a lack of money for basic needs like food, repairs of household equipment, buying prescription medicines in a pharmacy as well as electricity bill payment. The material condition index was calculated as a mean of the values of two partial variables concerning the subjective assessment of the living conditions (assuming that 1 signifies very bad, 2 – bad, 3 – average, 4 – good, 5 – very good) and the subjective assessment of the material circumstances of the household (1 – very poor, 2 – poor, 3 – average, 4 – rich, 5 – very rich).

The psychic condition index has been calculated as a mean of the responses of the respondents to the questions asked concerning his/her feeling of happiness and of loneliness. The respondents assessed their feeling of happiness on a scale of 1 (very unhappy) to 8 (very happy) as well as a range of one's contacts with other people on a scale of 1 (very lonely) to 8 (has a great many contacts).

The synthetic index of material standing (pauperisation) of the social surroundings of the respondent was calculated as the mean of the value of the three partial variables: the assessment of the material condition of his/her distant relatives (members of family that does not live with the respondents); assessment of the material conditions of his/her neighbours and assessment of the material condition of the community (town/village). In each case the following scale was applied: 1 – very poor, 2 – poor, 3 – average, 4 – rich, 5 – very rich.

The synthetic index of social inclusion of respondent in informal social networks was calculated as the mean of 4 partial variables concerning the frequency of meetings of the respondents with the immediate family (parents/children, siblings that do not live with them), with the distant relatives, with friends and neighbours. The synthetic index of social inclusion of respondent in formal institutions was calculated as the mean from 4 partial variables concerning the frequency of participating in events organized by following local institutions: the school, the local authorities, Voluntary Fire Brigade and by the Church/Parish. In each case the scale was applied from 1 to 5, wherein 1 signify never and 5 always.

The Intensity of Assistance Received Index and the Intensity of Assistance Rendered Index were calculated as a mean of the frequency of assistance received/rendered from the designated categories of supporting people (parents, children, grandparents, siblings, distant relatives, neighbours, friends) and the mean of the frequency of assistance received/rendered in relation to given affairs (work, assistance in official affairs, personal problems, cash loan, moral support – understanding problem situations, looking after children/ill members in the family, maintaining of everyday life (shopping, cleaning), assuming that 1 signifies that the respondent never receives it/does not render support in relation to a given person/in a given difficult situation in life, and 2 shall signify rarely, 3 – often, 4 – very often, 5 – always. The span of the given index shall constitute the range from 1 to 5.

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The book "Poverty and Social Exclusion. Research – Methods – Results" edited by Stanisława Golinowska, Elżbieta Tarkowska and Irena Topińska is the first publication from the project "Poverty and Social Exclusion and the Methods of Combating Them".

The project is being led at the Institute of Labour and Social Studies and coordinated by Professor Stanisława Golinowska. The book consists of five parts and appendix. In the first part the definitions of poverty and social exclusion are discussed. Stanisława Golinowska and Piotr Broda-Wysoczy present different concepts of poverty and social exclusion. Kazimierz W. Frieske using the example of social exclusion comments the way, in which old notions with new names are pretending to be new phenomena.

Second part is dedicated to the poverty measures and it contains articles of Polish, Hungarian and British authors. They report on national experiences and results in poverty measurement as well as provide some comments on research and measures on poverty used and recommended by the World Bank and Eurostat.

Third part describes poverty and social exclusion research concentrated on specific social groups, like children or women. There are also remarks on the features of poverty in post-communist countries as well as on the emergence of underclass in this group of countries.

Fourth part deals with the policies aimed at combating poverty and social exclusion. Apart from the extensive case study of the Czech Republic, Polish experiences are analysed in depth. Stanisława Golinowska summarises the development of the Polish social policy and suggests a periodisation of it. Joanna Starega-Plasek describes evolution of social assistance in Poland during the transformation and Agnieszka Chłor-Dominiczak reports on the Polish results of creating and implementing the strategy of social inclusion. Tito Boeri analyses active labour market policies with regard to combating poverty and Denis Crowley provides overview of the open method of coordination in the social policy of the European Union.

Fifth, final part is a summary of comments and recommendations formulated toward the project tasks and anticipated results by researches taking part in the project conference in Pułtusk in November 2004. The conference in Pułtusk was the opening conference of the project "Poverty and Social Exclusion and Methods of Combating Them". In November 2006 a closing conference presenting project results will take place.

Appendix offers two examples (Polish and Hungarian) of the good practices in combating poverty and social exclusion. The book is basically in Polish, however some articles, especially by foreign authors, are retained in English.
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The Institute of Labour 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.

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- Collective labour relations (social partners, collective disputes, employee participation, collective bargaining, collective agreements, collective labour law).
- Social policy (state social policy, social security, social institutions and instruments, family problems and family policy, poverty, social exclusion and counteracting measures).

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- Influence of EU integration on labour market situation and trends,
- Labour market and social policy and the challenges of integration,
- European and Polish standards of social security,
- Social exclusion and reintegration.

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