

## HOW THE FAMILY 500+ PROGRAM FACILITATES SOCIAL INVESTMENTS?

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***Abstract.** In 2016, the Polish government considered necessary to undertake public actions aimed at influencing the structure of population and the course of demographic processes. At the same time, public policies have been established to respond to the expectations of citizens resulting from the new population structure and societal changes. This article describes the Polish Family 500+ program after 2 years of its implementation. The Family 500+ program is not only a legislative means to increase the birth rate, but also represents a new paradigm in social policy, which would ensure a high level of social capital to future generations.*

***Keywords:** family support, social programs, investing social policy.*

### Introduction

The "Family 500+" Program was introduced in Poland based on the Act of 11 February 2016 on the public aid of state to boost birth-rates and reduce child poverty by improving living conditions of large families (Act. poz. 1851, 2016). It was one of the most important social programs announced before the parliamentary elections in 2014 and its implementation after the won elections by the environment of the Law and Justice party was signaled. The program after electoral success of the Law and Justice was implemented very quickly and effectively.

From the beginning, the Program aroused controversy due to its significant, multi-billion charges of the budget, but also for both positive and negative aspects, which were exposed on the occasion of its affirmation and criticism (Sowa, 2016).

The Family 500+ Program introduced care benefit for the second child and subsequent children up to the age of 18. In this situation, the benefit is due regardless of income. The Family 500+ Program, which can be also a financing support of the first child in family, i.e. the only or the oldest child up to the age of 18, is dedicated only provided that basing on income criterion, which is a specific amount per one family member (The income criterion in 2018 has been set at PLN

800 netto monthly per person in the family or PLN 1200 netto per person in a family whose member is a disabled child).

### **Aim and research methodology**

The aim of this article is to present the current scientific research and public opinion and attempt to make a certain summary - how the Family 500+ Program is perceived and evaluated by the recipients themselves as well as by experts, decision makers and practitioners, including social workers. The research was based on a systematic analysis of the scientific research and opinion polls.

The review of previous research from the last two years points out the strengths and weaknesses of the Program also in the context of implementing a social policy and a family policy. Following the main hypothesis of the article it can be assumed that from the point of view of social policy (including family policy) the Family 500+ Program has more advantages than disadvantages and from this point of view it is said about some success in implementing this Program. The analysis concerns the presentation of both researches conducted as part of scientific investigations and the characteristics of the main conclusions from public opinion polls in Poland carried out from June 2016 to December 2018.

An additional technique was the analysis of the latest data from The Main Office of Statistics (GUS) and available reports of the Ministry of Family, Labour and Social Policy (MRPiPS) from the monitoring of the Family 500+ Program.

### **The Family 500+ Program as instrument of an investing social policy**

Undoubtedly, as we underlined in the beginning of the article, the Family 500+ Program is a social program inscribed in the long-term strategy of social investments, but it should be noted that in addition to an important social context it carries extremely important economic, political and cultural consequences in short-term, especially for the poorest families (Szarfenberg, 2017a; Hagemeyer, 2017, 11).

From the social point of view (or social policy implemented so far), the Family 500+ Program is important one, it is taken to be a program of investing in the family, which for the first two decades of political transformation after 1989 in Poland was not a subject of specific public policy (Auleytner et al., 2016). The state was not very interested in running of a pro-family policy, in fact many social tasks were transferred to the family, supported in the time of real socialism by public enterprises and the state (Grewiński, 2017). From this historical perspective, the Family 500+ Program was going to be successful one from the very beginning because it was the first major program of real support of the family

in Poland. Therefore, from the point of social policy view, it is assessed positively in the majority of cases. The economic consequences of the Program have already been assessed in a more diverse way - many economists have raised the issue of very high costs for the public budget from the very beginning, they also indicated a number of negative consequences for the labor market and deactivation of women mainly, which may have specific, negative effects on the economic situation, but also on the result of future pensions of women resigning from work due to receiving a benefit from the Family 500+ Program (IBS, 2016).

The Family 500+ Program can significantly contribute to the redefinition of the function of traditionally perceived *welfare state* also in the context of more egalitarian solutions and introduction of universal instruments addressed to socially marginalized groups as well as the middle class or even higher class. The Family 500+ Program can be perceived as an element of new perspective of social policy - an invest social policy (Grewiński, 2015).

The main function of the investment approach in social policy is investing in the youngest generation in order to prepare a new generation of citizens in the perspective of 20 years - on the one hand more independent, entrepreneurial, creative citizens, on the other more conscious, responsible and sensitive. A responsible investment in children is to contribute in the next generation of adults in the creation of high quality human, social, creative and cultural capital. The investment paradigm says, i.e. about the importance of early childhood education and investing in the education and upbringing process of children, as well as investing in family services and activation policies.

Young people should be provided with vocational training preceded by an appropriate social and professional-social pre-orientation in order to use the best-diagnosed skills and competences in the labor market of the future.

Very important are also transgenerational transfers that invest in the young while securing extended services for the elderly.

Also reconciliation of social and professional roles of men and women along with appropriate time management for the family and for their own development are the core of an invest social policy (Morel, Palier, Palme, ed., 2015). It seems, that the Family 500 + program with its family support functions in the educational and care process of children can be considered as a redistributive financial investment instrument of social policy (Grewiński, 2016).

### **A Review of Research and Analysis - Strengths and Weaknesses of the „Family 500+” Program**

When analyzing research on the Family 500+ program and the main conclusions thereof, it is worth noting that one of the first surveys carried out after several months of the operation of the 500+ Program was a study conducted by a

team of researchers from the Pedagogical Korczak University, who by means of a diagnostic survey, conducted surveys among families covered by the Program and social workers who were paying out the benefits from the program funds in the social welfare centers (Auleytner et al., 2016). The research was carried out in the Silesia region and included 100 family representatives and 145 workers of social assistance institutions. The research, among other things, aimed to answer the question whether the Family 500+ Program will affect the quality of life of the recipients of the benefits. It turned out that for 40% of survey respondents (families) the Program will certainly help to raising the standard of living, which will also affect the quality of daily existence. Only 6% of respondents felt that it would not influence over the quality of family life at all.

For other people, the Program should help to improve the quality of life, but without a special change. When asked for families about what the resources of the 500+ Program they will allocate the benefits, the following objectives were mentioned: additional sports and cultural activities (67%), additional extracurricular educational activities (58%), purchase of school materials (45%), electronic equipment (28%), nursery or babysitter (13%) (CBOS, 2016b).

Quite other indications were made by social workers during the survey, who claimed that according to their experience and observation, families spend the funds of the 500+ Program mainly for the purchase of consumer goods such as household appliances, consumer electronics, and also for the purchase of food products, including unfortunately stimulants (coffee, cigarettes, alcohol).

Thus, polarization and diversified assessment appeared among families and social workers, to which the resources of the Program are allocated. It probably resulted from the fact that social workers estimate the Family 500+ Program mainly through the perspective of their social welfare clients.

From the view, however, escape the families who receive the 500+ benefit and who have nothing to do with the social welfare system. The second significant national survey which has been done after a few months of implementing of the Family 500+ program and carried out for first time in the scale of whole Poland by CBOS (the Center of Public Opinion Research) was titled "Using the Family 500+ Program", and was done in the period from 21 to 12 October of 2016 with employees- care givers of children who are up to 18 years of age, and who receive a benefit of the 500+ Program. In this survey, some important questions were asked, which enlarge our knowledge about the assessing the Family 500+ Program by its beneficiaries. Respondents were asked, among others questionshow important the 500+ benefit is for households in the context of their budgets. It turns out significantly as many as 30% of respondents answered that the 500+ benefit is decisive in home budgets, and for 45% it plays a significant role. Only for 4% of respondents it does not make much of a difference, because

in the home budget is a small part of the total expenditure on children (CBOS, 2016b).

In the next attempt of this survey was also made to get the answer to the question - "Is the money from the childcare benefit in some way separated from the household budget and allocated for specific purposes, or simply supply the household budget and are spent on the needs of the whole family?".

As many as 44% of the respondents answered that the benefits from the service are in no way segregated in the household budget and are spent for the whole family. 34% replied that the funds from the benefit are separated partly and allocated for specific purposes, and 21% said they were partly released and partly not, 16% of households, parents decided to start or increase a pocket money for a kid or kids.

In the case of 4% of respondents, they decided to employ a caregiver to kids or they sent a child to a nursery or preschool, another 3% of households decided to use a non-public educational institution, which they would not be able to afford without the support of the Family 500+ Program. According to the CBOS research, 500+ funds are allocated mainly for the following products or services: clothing (31%), footwear (29%), vacations (22%), educational aids (22%), additional activities for children (20%), school trips (17%), food (17%), sports and cultural activities (17%), purchase of medicines (15%), renovation of an apartment (11%), purchase of electronic equipment (8%), purchase of a bicycle, roller balls and other similar items (8%), purchase of furniture (7%) (Grabowska et al. (ed.), 2017, p. 100).

One of the first effects of the Family 500+ Program discussed in Poland was supposed to be its potential impact on activity, or actually the professional deactivation of women in the labor market. Introduction of the Program may cause the professional deactivation of a large part of women in Poland which may have negative consequences for the labor market and the economy, but also it may have a long-term effect on women themselves, who will be limited to a lower retirement in the future because of shorter periods of employment (IBS, 2018). Approximately 40-55 thousand of women dropped out the labor market, probably due to the implementation of the Family 500+ Program, which provided a group of economically inactive people (Brandt, Kiełczewska, & Magda, 2018). Mostly, women with primary and lower secondary education, who usually have low incomes and who were employed in simple, unqualified jobs, have withdrawn from the labor market (Kryńska, 2017, 37). There are the simulations that as a result of the 500+ Program, were around 200-250 thousand women to leave the labor market (Mycka, 2016). Based on recent gus studies, the impact of the program is not so significant (GUS, 2018).

Most experts agree that while the Family 500 + Program may have a negative impact on professional activity, mainly women, it certainly contributes to the

reduction of poverty and social exclusion. The latest data of the Main Statistical Office (GUS, 2016), obtained during the survey of household budgets indicate that a significant decline of the range of extreme poverty and relative poverty in Poland is noticeable.

As regards individual households poverty rates have clearly decreased, especially among children aged 0-17. In 2015, the poverty rate amounted to 9%, and in 2016 - 5.8%. In the case of a family with at least four children, there is a decrease from 18.1% till 14%. In the case of families with three children - it ranged from 9 percent up to 4.7 percent. In the case of families with two children there was from 4 percent up to 2.7 percent (GUS, 2016).

A significant decrease in poverty between years of 2015 and 2016, like before and after the implementation of the 500+ Program was observed especially among such groups as large families with three or four or more dependent children (13.5% to 9%), households with a disabled person (from 9.1% to 7.5%), rural residents (from 11.3% to 8%), city populations in the cities below 20,000 (from 5.4% to 4%).

The level of people living at the subsistence minimum level also decreased - from 5.5% to 4.9%. The number of people benefiting from social assistance decreased by over 9%, which may be the result of both the 500+ Program and the improving situation in the labor market (unemployment in Poland in 2017 is the lowest since 27 years and reached about 6%). Moreover, the number of social assistance benefits paid decreased - for example, by 50,000 as well as the number of periodic benefits paid decreased - from 459 thousand to 408 thousand (Bojanowska, 2017, 245). According to the latest CBOS survey conducted in 2017 on a sample of over 3,000 parents who receive a benefit of the 500+ for 30% of the surveyed parents this benefit is a very important part of the household budget (CBOS, 2017)

From other CBOS surveys called "Family 500+ Program Evaluation after almost an year of its introduction", it appears that the level of Program acceptance by Poles is very high and currently amounts to 77% in contrast with 20% of social disapproval.

The percentage of respondents who link the Program's actions to the increase of the number of births (increase from 16% to 24%) increased within the year. The research shows that Poles perceive much more positives than the negatives of the Program.

According to the respondents, thanks to the Program, Polish families have more opportunities to manage their money more freely, the marital and family relationships have been improved as well as more time parents can spend with their children. However, a lot of people (14%) also can see the Program negative effects, such as wrong spending of money by some parents (CBOS, 2017).

The impact of the 500+ Program on the number of births can certainly be assessed in a perspective longer than one year, two years from the start of its operation, but the first data may give lightly moderate optimism that the fertility has moved up (CBOS, 2016a).

According to the latest ministerial (MRPiPS, 2016) data in 2016 almost 13,000 more children were born than a year earlier, and the highest birth rate is referring to the last two months of the year, i.e. children are conceived after the introduction of the 500+ benefit.

Data available from the Ministry for the first half of 2017 are even more optimistic, because they indicate that over 14,000 more children were born in this period than in the same period of last year - 2016. But it is too short term to prove an impact of the 500+ Program on increasing fertility in Poland. The number of children increase in families who wish to have offspring, because thanks to Family 500+, parents will gain financial stability, which will allow them to have more than one child, improving the quality of life of their children (Brzezińska, 2017).

It may be caused by good economical situation or the more family-friendly atmosphere at the moment and the introduction of many different family support instruments, including the development of social services (Kotowska, 2016).

### **„Family 500+” Program in the opinion of social workers**

In the context of the assessment of the Family 500+ Program it is worth to indicate that very often people who are skeptical about the implementation of the Program belong to the group of employees of social assistance centers.

Social workers point to the fact that resources from 500+ benefit do not belong into the household income, which results in the fact that many families still use the social welfare system and other social benefits despite using the funds of the Family 500+ Program.

The research carried out by the Janusz Korczak Pedagogical University shows that these employees have the following opinions on the possible consequences of the implementation of the Program: "Some parents/caregivers may become dependent on social benefits (75% of respondents), a large part of parents may withdraw from their professional activity (86%), the program may stimulate the domestic economy (31%), the economic potential of Polish families will be strengthened (27%), the program will cause the return of immigration of Poles living abroad (3.4%) (Auleytner et al., 2016, p. 16).

What is interesting, social workers generally believe that the Family 500+ program will not fulfill the care and educational function of family because, according to their opinion, financial means (cash benefits) do not necessarily help better performance of parenting or caring roles, even assuming that some parents

will give up their jobs and will have more time for the family (Auleytner et al., 2016, p. 17).

However, it is worth to remember here that social workers make assessments regarding the Family 500+ Program in the light of their clients of the social welfare system, who, however, consisting of no more than 10-15% of all recipients of the Family 500+ Program, which is addressed to all families with children regardless of the income of parents and the financial situation of the family.

In addition, for some employees of the social welfare system, who are generally poorly paid in Poland, the direct allocation of significant amounts of cash benefits also to dysfunctional families is certainly frustrating in the context of their low socio-professional status (Grewiński & Zasada-Chorab, 2013).

According to the Nationwide Remuneration Survey, the average salary on which the MOPS (the City Center of Social Help) employees can count is PLN 2,700 gross. Every second social worker receives a salary from PLN 2,330 to PLN 3 249. 25% of the worst paid social workers earn less than PLN 2 330 gross. Wages over PLN 3 249 gross can be counted by a group of 25% of the best-paid social workers<sup>1</sup>. Many insiders emphasize that the Family 500 + Program gather the negative (unintentional) effects of social activities. First, it eliminates, due to formal restrictions, some people who need this kind of support.

From July 2017, for a self-dependent parent to receive PLN 500 for his child, there must be proved that a parent is a single and a self-dependent. Therefore, such a parent must attach to the application for the benefit of the Family 500+ Program a court-issued document or approved by the court, confirming the establishment of the alimony for the child from the other parent.

Parents who are raising a child alone have to watch out an income limitation. In practice, this means that a single parent cannot earn more than PLN 1,600 per hand.

Secondly, in many families preserved the so-called "Syndrome of learned helplessness", namely the abandonment of active participation one of adult family members in the labor market, and the financial benefits of the program cause to making decisions that permanently remove some of the parents (especially women with a low level of education) from the labor market.

Resignation from work by some parents, especially in poor families, is associated with the risk of "inheritance" of passivity and a certain socio-professional status of the next generation based on the parents' life model, where a professional work is not perceived as a significant value.

Benefits under the "Family 500+ Program" are not included into the income of people applying for other types of social benefits, especially for the poorest.

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<sup>1</sup>[https://wynagrodzenia.pl/kategoria/zarobki-w-branzach\\_1](https://wynagrodzenia.pl/kategoria/zarobki-w-branzach_1)



By combining various welfare benefits, families receive significant amounts in quite the short term which cause the feeling of satisfying their needs in a very short period of time too. Thirdly, it reduces the possibility of real social work, reducing the chance of working with families. Social workers observe the lack of motivation to change the situation, especially in those households where significant financial resources originating from the program appeared.

Relative satisfaction of the current standard of living, especially that the 500+ program is primarily intended for current consumption, raises the quality of life in households of all its members (CBOS, 2017).

In the CBOS survey, it is noted that most households funds are merged and the benefits of program are not separated from household budgets (44%) or only in part 21% (CBOS, 2016b).

### **Conclusion**

Summarizing the analysis of various research presented above, both those conducted by scientists, even those conducted in the framework of opinion polls (CBOB, 2017), as well as analyzing the latest the Statistical Main Office (GUS, 2018) and Ministry (MRPiPS, 2017) data, it can be concluded that most of them indicate that after more than two years of implementation of "Family 500+ Program" the overall social rating is more positive than negative (Rymsza, 2018). On the other hand, the issue of deactivation in the labor market is perceived negatively, especially women who decide to leave work due to the inclusion of their families by the Family 500+ program (Rozwadowska, 2017). Furthermore, long term program's prenatal impact cannot be assessed and requires further monitoring.

At the same time, there are some concern that have been indicated by the insiders of the social welfare system, including social workers. They are an increase of the illegal economy shadow sphere where there are some tries to lower income in families with 1 child, to be covered by the Program, or spending funds contrary to the purpose - mainly in dysfunctional families. The Family 500+ program will require adjustments and additions to other impacts in the area of public policies: the labor market, care services, protection of young children, education.

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