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## The Analysis of Births and Household Poverty Levels with the Consideration of the Material Effect of the ‘Family 500 Plus’ Programme

### Abstract

*Objectives:* The objective of the article is to assess the performance of the Polish government’s family policy programme known as the ‘Family 500 Plus’ programme, with special consideration of the material effect. In this study, the authors attempt to assess the performance of the ‘Family 500 Plus’ programme (Journal of Laws of 2016, item 195 as amended) in the first years of its operation, answering the question about whether the implementation of the government’s family policy programme has contributed to an increase in births and a decrease in the level of poverty in households in Poland.

*Research Design & Methods:* The authors conducted research on the chosen indicators, using the method of incomplete induction based on inductivism and verificationism. The study relies on the literature review and desk research. The analysis made use of statistical data provided by the Central Statistical Office (GUS). In the preparation of this article, legal acts placed on the Website of the Sejm of the Republic of Poland – as well as relevant scientific publications – were used.

*Findings:* Since the launch of the ‘Family 500 Plus’ programme, the number of births has clearly been gradually increasing. In the analysed period, we have also observed positive birth changes within large families. The developmental trend of births showed an upward tendency in the first two years of the Act in force and changed in 2018. This clear change can be observed in the area of extreme poverty in households in 2015–2018. In households with at least two children up to the age of 18, there was a change in the extent of extreme poverty by almost 50%, which was approaching the extreme poverty line in a given year in Poland.

*Implications & Recommendations:* In view of the changes in trends in the number of births observed since 2018 as well as the extent of extreme poverty in households, the authors recommend further observation and analysis of the indicators presented in this study.

*Contribution / Value Added:* The presented analysis of the indicators and the observation of development trends will allow for a proper adjustment of family policy. In the future, this might make it easier for the public authorities to take appropriate decisions concerning family policy.

*Article classification:* research article

*Keywords:* social policy, family policy, births, birthrate, poverty

*JEL classification:* I38, J11, J18

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## Introduction

Family policy is a significant element of social policy, which creates an important area of activity for every public authority. There is no common definition for family policy, as the area of interest that it covers is extensive and difficult to limit within clearly defined boundaries. Family policy can be considered within different contexts, from the perspective of objectives, through taking into account the environment, or through the lens of its functions.

Kurzynowski (1991) considers family policy to be part of social policy, defining it as social policy with respect to the family. He describes family policy as the whole activity of the state (creation of legal norms, mobilisation of resources, and undertaking actions) which aim at constructing appropriate living conditions for families: its establishment, its proper functioning, and its fulfilling of all significantly social functions (Kurzynowski, 1991, p. 96). Sobociński, in turn, defines family policy as a direct action of the state to reimburse the costs of maintaining multi-child families, as well as activities related to facilitating the combining of professional life with childcare and creating effective mechanisms for establishing and enlarging families (2016, p. 1). And then, Auleytner and Głąbicka define family policy in the context of social welfare, acknowledging that the activity of state authorities, whose aim is to develop the family regardless of its material status, is family policy (2000, p. 178).

The aforementioned definitions are part of the family policy objectives of the state, which can be characterised in terms of conditions for the creation, development, and satisfaction of the living and cultural needs of the family (Kurzynowski, 1991, p. 96). Thus, the role of the state authorities is to shape such living conditions so as to enable a comprehensive family development. Therefore, this postulate is viewed in an inclusive manner as providing the possibility to implement the model chosen by the family itself in terms of the quality of life and the fertility rate of the family. Such

a model is socially expected nowadays, because it gives grounds for ensuring the biological development of society (Kotowska, 1999). Hence, one of the important problems faced by the family policy of the state is the demographic challenge.

Another challenge of the family policy of the state concerns the material and economic status of the family. A concern for the material and economic status of the family obliges the state authorities to take actions aimed at protecting the family against poverty and social exclusion by means of making it possible, among other things, to earn money and develop new forms of employment and professional activity in society (Durasiewicz, 2017, p. 17).

Poverty is one of the reasons for social exclusion; it happens through a complete elimination or hindrance of the participation in social life (Maj-Waśniowska & Stabryła, 2020, pp. 95–112). Its consequences are experienced by the entire society (Ulman & Ćwiek, 2014).

The notion of poverty is associated with categories such as social minimum and subsistence level. It expresses the lack of possibility to fulfil specific needs on a satisfying level (Panek, 2011, pp. 5–20). Poverty is also defined as a disruption of the balance between the determined system of needs (in axiological terms – values) and the level of their fulfilment (Lipski, 1993, pp. 27–34). Perceiving poverty through the prism of having sufficient income and/or wealth results in understanding poverty as a factor that limits the ability to fulfil life functions (Ulman & Ćwiek, 2014).

It is also necessary to mention the axiological challenges, which differ in the scope of interest of family policy, and which are related to the considerations regarding the preservation of family values and their importance in today's changing post-industrial society (Durasiewicz, 2017, p. 18).

Direct family policy is implemented through economic, institutional, and legal instruments. One of the instruments by which the state authorities influence the material and economic status of families in Poland is the one adopted by the Polish Parliament in 2016, namely the Act on State Aid

in Child Rearing (Journal of Laws of 2016, item 195 as amended), commonly known as the 'Family 500 Plus' programme.

In 2019, the Polish government decided to modify the aforementioned Act, removing the income threshold, thus extending the scope of benefits to all children under eighteen years of age. The amendments to the Act became an incentive to evaluate the hitherto existing 'Family 500 Plus' programme.

The aim of this article is to attempt at answering the question about whether the implementation of the government's family policy programme (the so-called 'Family 500 Plus' programme) has contributed to an increase in births and a decrease in the level of poverty in households in Poland.

### **The idea behind the introduction of the 'Family 500 Plus' programme**

Family benefit payments are one of the basic instruments of family policy (Głąbicka, 2009, p. 58). Introducing the Act on State Aid in Child Rearing in 2016, the Polish government used an instrument of family policy which is targeted towards the family (explicitly). It directed particular actions, aimed at achieving specific family goals (Drejer, 2011, pp. 244–245).

In the justification to the aforementioned Act on State Aid in Child Rearing, one can read, above all, that as a result of its implementation, families bringing up children receive financial aid from the State, which will result in a reduction in the costs borne by families when raising children. Later in the justification, the Government states that the role of the introduced legal act is to counteract the demographic decline in Poland by granting a new childcare benefit to families. The aim of the new legal regulation is to encourage families to fulfil their fundamental social role and choose the model of a multi-child family.

Research into the danger of poverty shows that an extensive range of risks occur in big family households (Ulman & Cwiek, 2014). Poverty in large families has many aspects. On

the one hand, it restricts the possibilities of both obtaining a better education by children from large families and retaining good health; on the other, it constitutes a barrier in access to, among other things, cultural property, which may be an obstacle for development. It can affect the possibilities of finding suitable employment and improving the living conditions in adulthood. This leads to a situation in which young married couples decide against having many children, which negatively affects the socio-economic state of the country (Ulman & Cwiek, 2014).

The Education Law Act (Journal of Laws of 2020, item 910, consolidated text) defines a large family as a family raising three or more children. And then, the Statistics Poland defines a large family as a family in which there is a bond between parents and children (not necessarily a biological one), and in which there are at least three children (Statistics Poland, Poverty in Poland in 2015 and 2016). Hence, the number of children is the primary criterion defining the structure of a family.

The number of large families in Poland is systematically decreasing, which is visible in the data included in census lists from the year 2002 and 2011. In 2002, there were 8001.1 thousand families in total in Poland, including 944.5 thousand families with three children and 428.3 thousand families with four or more children. In 2011, the total number of families amounted to 8130.9 thousand, including 732.5 thousand families with three children and 273.3 thousand families with four or more children (Statistics Poland, Households, Demographic characteristics, 2011 National Population and Housing Census). In the last decade, the number of large families decreased by nearly 387 thousand.

Changes in birth occurring in 2005 according to the order of the birth are presented in Figure 1. According to the birth order, a systematic decline in the birth of living children – especially concerning the third child and consecutive children – has been observed since 2009. Thus, it can be concluded that the number of large families is still decreasing.

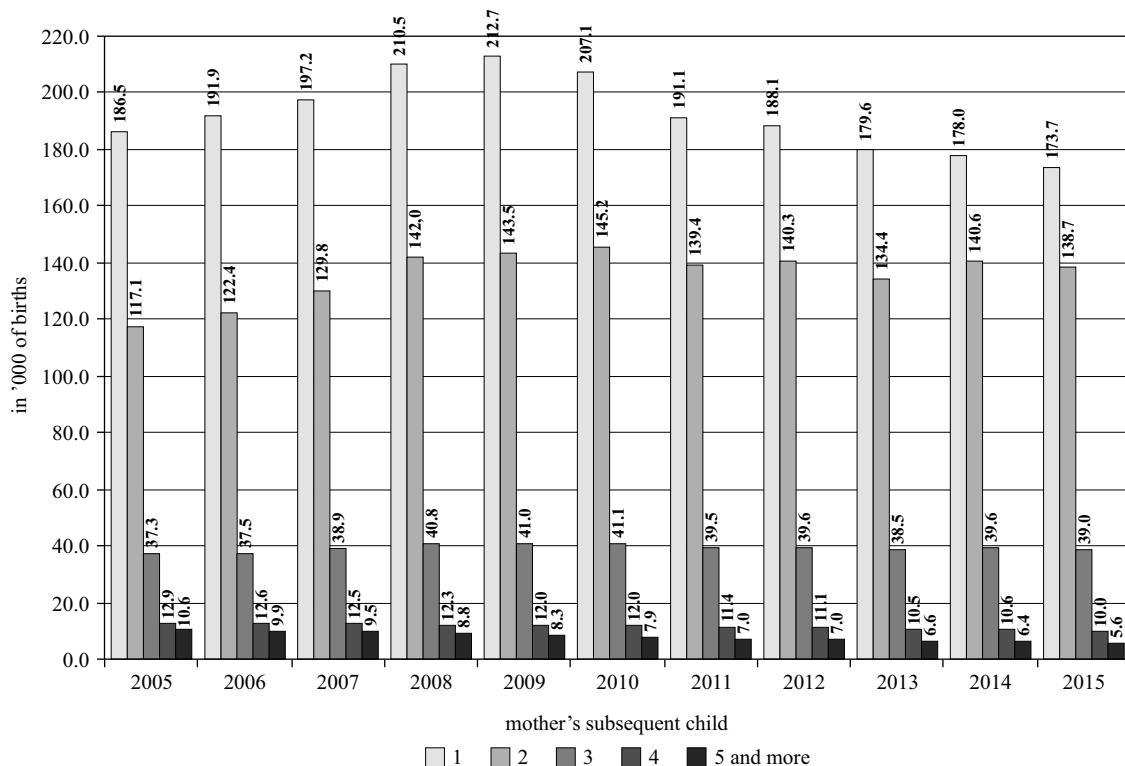


Figure 1. Live-birth order of mothers in Poland between 2005 and 2015

Source: own study based on the Statistics Poland data, *Demographic Yearbook of Poland* 2008, 2010, 2013, 2014, 2015 ([www.stat.gov.pl](http://www.stat.gov.pl)).

In 2015, in the period when the discussion on the Act on State Aid to Child Rearing (Journal of Laws of 2016, item 195 as amended) had been started, 370.4 thousand children were born in Poland (including 369.3 thousand live-born children and 1.1 thousand stillborn children) (Statistics Poland, 2017, p. 258). For the given data, births can be classified by the order of birth of a mother's child (Table 1).

In 2015, 173.7 thousand children were born as the mother's first child, 138.7 thousand children were born as the second child, and 39.0 thousand children were born as the third child. Less than 10.0 thousand (9.995) children were born in 2015 as the mother's fourth child, while 5.6 thousand children were born as the fifth child or the next

ones. To a much lower extent, mothers choose to have more children if they already have two, three, or more children. The birth of the third child and the next children is much less popular than the birth of the second one; the birth rate in this range is falling dramatically. In 2015, around 45% of mothers (out of the number of live births) chose to give birth to their first child, less than 38% to the second child, while less than 15% decided to have the third child or the next children. The main decision factor in this case is of economic character.

The financial aid introduced under the 'Family 500 Plus' programme in the form of a child-rearing allowance was intended to eliminate economic barriers, especially among families with short

Table 1. Order of birth of a mother's children (2015)

Number of children in the family (in thousands)				
the first child	the second child	the third child	the fourth child	the fifth child and over
173.7	138.7	39.0	10.0	5.6

Source: Statistics Poland, *Demographic Yearbook of Poland 2017*, Statistical Publishing Establishment, Warsaw 2017, p. 263.

marital experience when they decided to have more children. The government argued that families with children are at a greater risk of poverty than those without children<sup>1</sup>. Considering types of households, families without children or those with one child are less at risk of poverty than families with at least three children.

Consequently, the second objective – apart from increasing the fertility rate, thus improving the demographics in Poland and counteracting the ageing of the population – was to protect and improve the economic status of households with children who are at risk of poverty.

The 'Family 500 Plus' programme established financial support for the second child and the next children in the household up to the age of eighteen at the amount of 500 PLN, and was not contingent on the financial status of the family. Financial conditions were established for support for the first child. Households could apply for financial support for the first child after meeting the income criteria of 800 PLN per person in the family, or 1200 PLN if there was a child with disabilities in the family.

In 2015, the extreme poverty rate of households, including households raising children up to eighteen years old (% of people in households) was 5.3% for families with one child; 8.1% for families with two dependent children; 16.7% for families with at least three children; while for households without children – 3.7% (Statistics Poland, 2017, *Poverty in Poland in 2015 and 2016*, pp. 11–12). The

poverty rate among households raising at least one child under sixteen with a disability certificate was 10.7% (Statistics Poland, 2017; *Poverty in Poland in 2015 and 2016*, p. 15). The extreme poverty line in 2015 was 6.5% (Statistics Poland, 2017, *Poverty in Poland in 2015 and 2016*, p. 9).

## Research and materials

In order to answer the research question, the authors studied the mentioned factors, employing an incomplete induction method based on inductionism and verificationism (Lisiński, 2016, pp. 23–46).

The statistical data with regard to the factors – including the number of live births according to the order of mother's births and the range of extreme poverty of households in Poland in the period assumed for analysis – was provided by the Statistics Poland in the said period.

The order of mother's childbirth should be understood as the number of infants that the mother gives birth to in a given year, taking into account all previous live- and stillborn children (Statistics Poland, terms used in official statistics).

In the classic approach, poverty is measured by means of the analysis of income and the total equivalent income of households. When analysing welfare, researchers tend to move towards an approach whereby total expenses which concern prices are connected with the living standard and, therefore, reflect the level of "real income" (Slesicki, 1998, pp. 2108–2165; Atkinson et al., 2003; Szulc, 2007, pp. 131–163; Kot, 2008).

Hence, the analysis includes the factor of extreme poverty range, which refers to the level

<sup>1</sup> The justification for the bill on state aid in raising children: <https://legislacja.rcl.gov.pl/docs//2/12279566/12326791/12326792/dokument199001.pdf> (accessed: 28.04.2020).

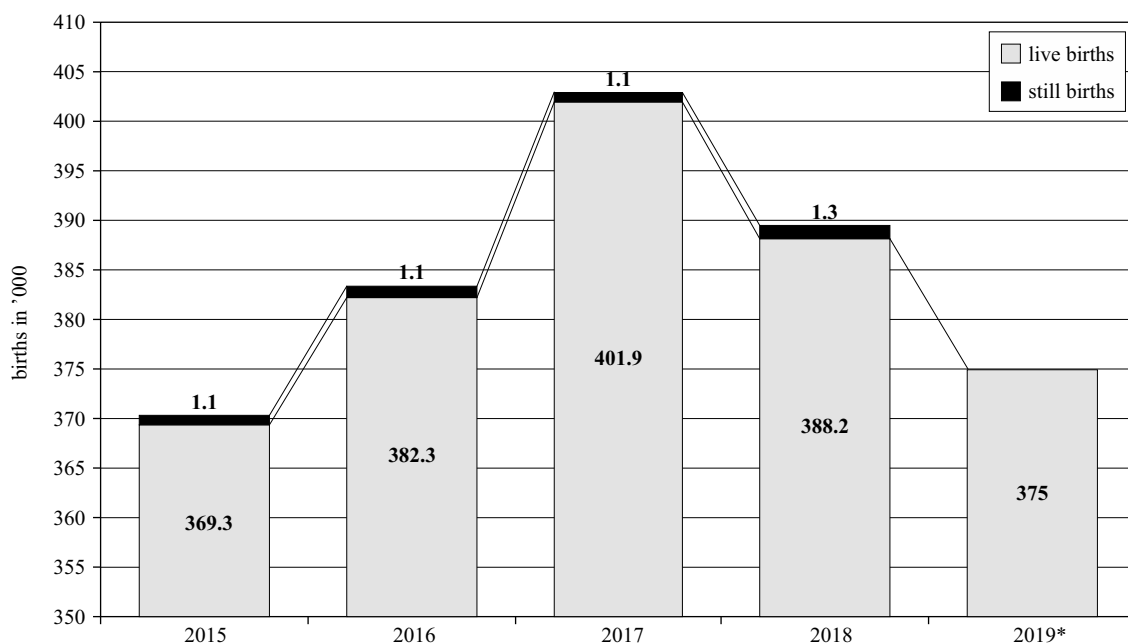
of household expenses in relation to the extreme poverty border – a minimum of subsistence – determining the level of fulfilment of needs. A biological threat to life and psychophysical development of a human being occurs below this level, which is congruent with the above-mentioned notion of poverty. The minimum of subsistence calculated by the Institute of Employment and Social Affairs for a household of one employed person is then multiplied by the number of people in the household according to the original OECD equivalence scale (Statistics Poland, terms used in official statistics). It is the starting point for determining the borders of extreme poverty.

### Changes in the level of indicators during the ‘Family 500 Plus’ programme

During the three years in which the ‘Family 500 Plus’ programme was running (from 2016 to

2018), payments of childcare benefits under this programme alone amounted to 62.4 billion PLN (Statistics Poland, 2019, Concise Statistical Yearbook of Poland, p. 156; Statistics Poland, 2018, the range of extreme poverty in Poland in 2018, p. 5). The first childcare benefits were paid to families on April 1, 2016.

In 2016, the birth rate increased by over 3.5% compared to 2015 (Statistics Poland, 2018, Branch Yearbooks, *Demographic Yearbook of Poland 2018*, p. 256). The year 2017 brought a significant increase in births, i.e. almost 5.1% compared to 2016; compared to the base year, i.e. 2015, the birth rate increased by over 8.82%. In 2018, there was a decrease in the number of births compared to the previous year. The percentage of births in comparison with 2017 decreased by 3.41%. Nevertheless, in 2018, there were 5.11% more children born than in the base year 2015 (Statistics Poland, 2019, Branch Yearbooks, *Demographic*



\* year 2019 – data based on the Statistics Poland data, the Statistical Bulletin 03/2020, Yearbook Volume LXIV, Warsaw 2020, p. 44 ([www.stat.gov.pl](http://www.stat.gov.pl)).

Figure 2. Births in Poland between 2015 and 2018

Source: own study based on the Statistics Poland data, Demographic Yearbooks of Poland 2017 and 2018 ([www.stat.gov.pl](http://www.stat.gov.pl)).

*Yearbook of Poland 2019*, p. 250). According to the preliminary data of the Statistics Poland, in 2019 the number of births decreased again by 3.4% compared to the previous year (Statistics Poland, 2020, *Statistical Bulletin* 03/2020, p. 44).

The stillbirth rate is evenly distributed and does not affect birth-rate conversions. Changes in births during this period are shown in Figure 2.

Taking into account live births in 2016, 175.9 thousand mothers gave birth for the first time (it was their first child), 146.9 thousand mothers gave birth to their second child, and 42.5 thousand mothers gave birth to their third child, while for 10.7 thousand mothers who gave birth at that time, it was their fourth child, and 6.0 thousand mothers saw the birth of their fifth child or the next one (Statistics Poland, 2018, *Demographic Yearbook of Poland 2018*, pp. 256, 265). In 2017, on the other hand, 172.6 thousand children were born as a mother's first child, 161.3 thousand as a mother's second child, 49.9 thousand as a mother's third child, while for 11.9 thousand mothers it was

the fourth child, and 6.2 thousand mothers saw the birth of their fifth child or the next one (Statistics Poland, 2019, *Demographic Yearbook of Poland 2019*, p. 255). Compared to 2015, there was an increase of 8.1% in births of a mother's second child in 2016 and almost 16.3% in 2017, while for mothers for whom it was the third child, the birth rate increased by 9% in 2016 and by 26.4% in 2017. A relatively large increase in births was also recorded for mothers for whom it was the fifth child and the next one. The percentage of births compared to 2015 in this group of mothers increased by 20% in 2016 and 24% in 2017. The observed changes are presented in Figure 3.

The extent of extreme poverty in families with children in the analysed period improved significantly. This is particularly noticeable in families with two or more children, as well as in families with a child with disabilities. Depending on the number of children in a given household, the number of households living below the poverty line raising children up to the age of eighteen

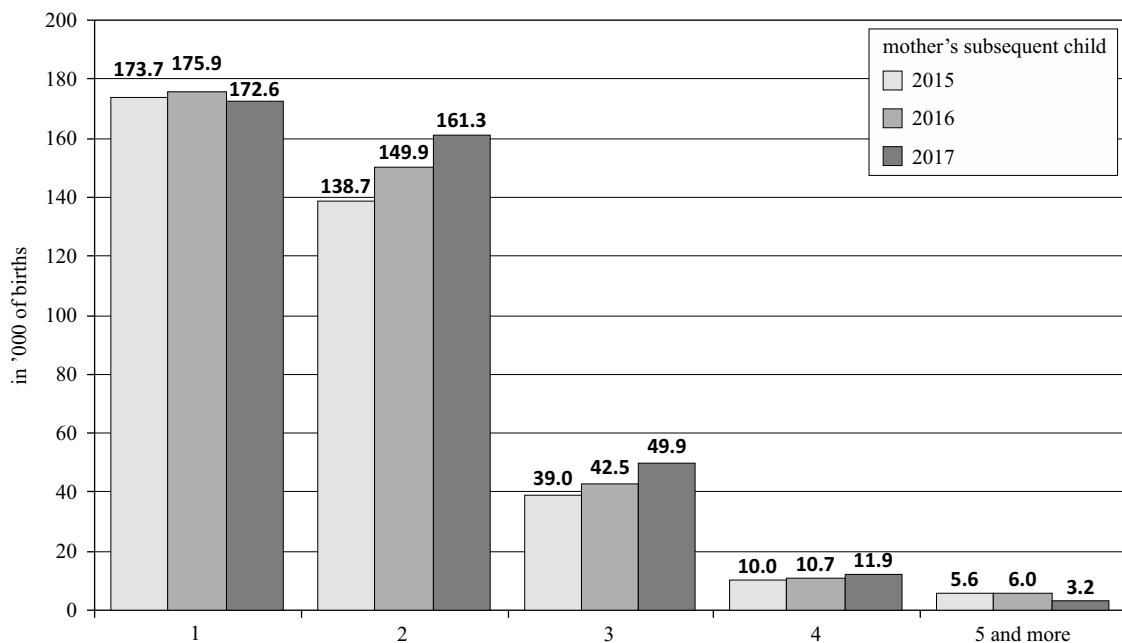


Figure 3. Live-birth order of mothers in Poland between 2015 and 2017

Source: own study based on the Statistics Poland data, *Demographic Yearbooks of Poland 2017 and 2018* ([www.stat.gov.pl](http://www.stat.gov.pl)).

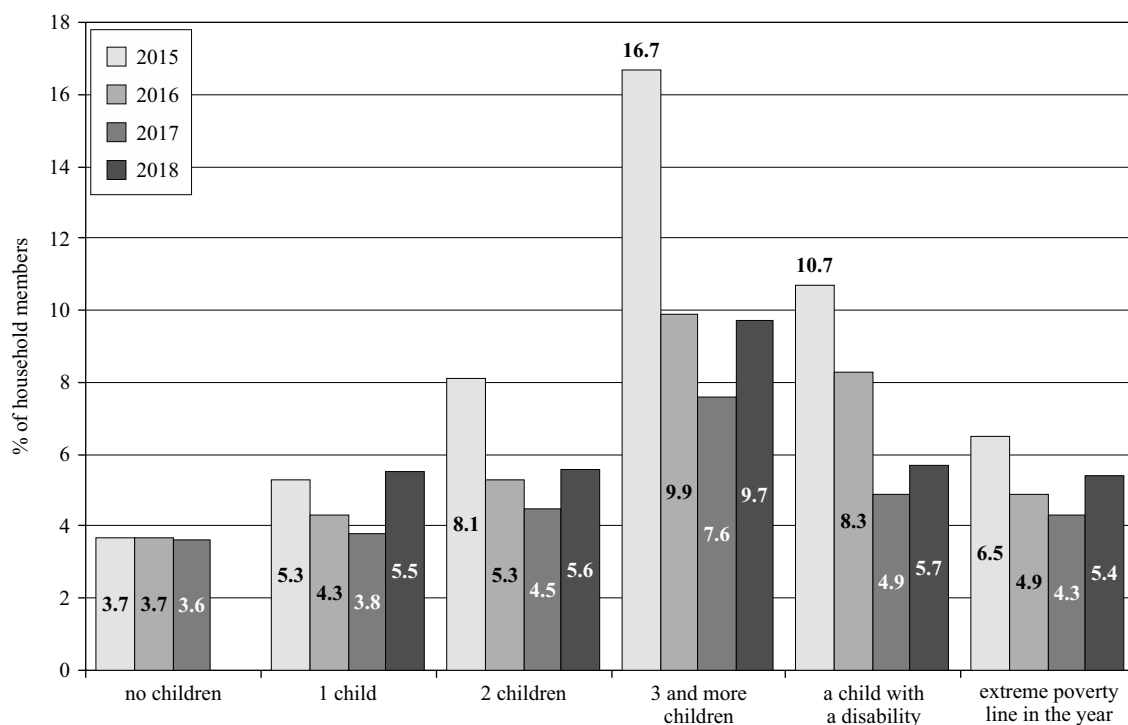


Figure 4. Extent of extreme poverty in households with and without children as well as those with children with a disability certificate in Poland between 2015 and 2018

Source: Own study based on the Statistics Poland data, Poverty in Poland in 2015 and 2016 and Scope of Economic Poverty in Poland in 2018 ([www.stat.gov.pl](http://www.stat.gov.pl)).

(for households raising at least one child up to the age of sixteen with a disability certificate) is presented in Figure 4.

In 2016, the extent of extreme poverty in households raising children at the age of up to eighteen years old compared to the base year, i.e. 2015, decreased by 1 percentage point for families with one child, by 2.8 percentage points for households with two children, and by 6.8 percentage points for households with at least three children. Meanwhile, for households with at least one child with a disability certificate, the extent of extreme poverty was reduced by 2.4 percentage points. The percentage of households living in extreme poverty in Poland that year was 4.9 percent (Statistics Poland, 2017, Poverty in Poland in 2015 and 2016, pp. 9–12).

Another reduction in the scale of extreme poverty was recorded in 2017. During this period, there was a 1.5 percentage-point decrease in the extreme poverty rate in comparison to 2015 in households with one child, while in the group of households with two dependent children, a 3.6 percentage-point decrease was recorded. For households with at least three children, the scale of extreme poverty was reduced by 9.1 percentage points. The extent of extreme poverty among households with at least one child with a disability certificate decreased by 5.8 percentage points. A reduction in the scale of extreme poverty was also recorded in comparison with the preceding year, i.e. 2016. During this period, the greatest reduction was recorded in households with at least three children, i.e. 2.3 percentage points, as



well as in households with at least one child with a disability certificate – 3.4 percentage points. The level of extreme poverty in Poland in 2017 was 4.3% (Statistics Poland, 2018, the range of extreme poverty in Poland in 2018, p. 5).

The year 2018 also brought a change in the level of extreme poverty in households raising children in comparison with previous years, but there was a clear increase in the level of extreme poverty in households raising children when compared to 2017. However, comparing the data from 2018 and 2015, one can observe a decrease in the scope of extreme poverty only in households with at least two dependent children. In the group of households with two dependent children, the reduction in the scope of poverty was by 2.5 percentage points, while for households with at least three children, the reduction was by 7 percentage points in comparison to 2015. A reduction in the extent of extreme poverty was also recorded in households with at least one child with a disability certificate. The reduction in this group of households was by 5 percentage points. The level of extreme poverty in Poland in 2018 was 5.4% (Statistics Poland, 2018, the range of extreme poverty in Poland in 2018, p. 5).

### **The analysis of changes in the indicators of the adopted goals of the ‘Family 500 Plus’ programme**

When analysing the birth rates, one can see that since the launch of the ‘Family 500 Plus’ programme, there has been a clear increase in births. Individual years in relation to the base year 2015 each time brought an increase in births, where in 2017 there was an increase by 8.83 percentage points. In 2018, despite the increase in the number of births in comparison to 2015, for the first time since the introduction of the ‘Family 500 Plus’ programme, there was a decrease in the number of births in comparison to the previous year. Another decrease in the number of births took place in 2019 (when analysing the results year by year). However, the birth rate in relation to 2015 was still

higher (5.7 thousand more children were born). In the analysed period, one can also observe positive changes in births in multi-child families, where more mothers chose to have another child. Positive changes can also be observed among families that had had only one child; more mothers decided to have the second child. However, in the case of mothers who gave birth for the first time, in the analysed period there was no noticeable change in the number of births and the percentage of changes was within the range of 0.5%.

The developmental trend of births – which in the first two years of the duration of the Act (Journal of Laws of 2016, item 195 as amended) showed an upward trend – changed in 2018. It can be simultaneously observed that the increase in births occurred within multi-child families. Compared to the year 2015, there was a clear increase in live births in the birth order for mothers with at least two children. In each analysed period, there was a marked increase in the number of births and the developmental trend maintains an upward tendency. In the case of mothers who gave birth for the first time, the developmental trend in each analysed year is constant. Year after year, the percentage of births in mothers with one and another child increased.

A visible change could be seen in the extent of extreme poverty in households between 2015 and 2018. While for households without children the change is insignificant, namely by 0.1 percentage point, there were significant changes in the extent of extreme poverty in households with children. In households with at least two children up to the age of eighteen, there was a change in the extent of extreme poverty by almost 50%, and it was approaching the extreme poverty line in a given year in Poland. Also, in the case of households where at least one child had a certified disability, the level of extreme poverty was clearly reduced and came significantly closer to the level of poverty (the extreme poverty rate, in this case, was 0.3% higher than the extreme poverty line in Poland).

The analysis of the indicators of the set objectives clearly demonstrates that the introduction of the 'Family 500 Plus' programme was a stimulus for the occurrence of favourable changes in the intended area (multi-child families and the eradication of poverty). Although no clear boundaries (numerical goals at which the legislative authority was aiming) were given, in many cases the state financial support had a positive impact on decisions concerning the family model of many households. The financial support produced the intended effect of bringing about a change regarding poverty in families with many children, which had an influence on the view of the long-term family model, where having and bringing up children was connected with significant financial sacrifices and limitations on the part of the remaining members.

## Summary

On the basis of the analysis of the indicators presented in the comparative period in question, we can conclude that there has been a positive change in the form of the clearly noticeable material effect of the 'Family 500 Plus' programme in the first years of its operation.

It can be observed that the objectives of the 'Family 500 Plus' programme were achieved in all three categories, i.e. an increase in fertility rate, an increase in multi-child families, and a reduction of extreme poverty in families with many children. Therefore, the use of an instrument of family policy – addressed to families in the form of the Act on State Aid in Child Rearing, which initiated specific and targeted actions – was the right move.

The subject of our considerations was the material effect of the 'Family 500 Plus' programme. The analysis of the number of births, including births in multi-child families, as well as the observation of changes in the poverty level of households with children, shows the effects of the implementation of the state family-policy programme ('Family 500 Plus' programme) over time. Taking into account the objectives set by the public authorities, it was observed that the extent of extreme poverty

in households with children (multi-child families) significantly decreased and came closer to the level of poverty in Poland. This is the result of the material support of the 'Family 500 Plus' programme, which was addressed precisely to these households (such were the original objectives of the Act).

The introduction of material support by public authorities also resulted in an increasing number of births among multi-child families (multi-child family model). The number of births in multi-child families significantly increased, while among mothers who gave birth for the first time, the numbers remained at the same level. Hence the conclusion that the results of births recorded in the years 2016–2018 were influenced by the financial support obtained by mothers, or a lack thereof. It should be recalled that according to the provisions of the Act (Journal of Laws of 2016, item 195 as amended), introduced in 2016, financial support was available for the second child and the next ones, whereas in order to receive financial support for the first child, income conditions had to be met, namely the average amount of income per family member had to be lower than that referred to in the Act. An amendment to the Act, implemented in 2019, established financial support for every child without imposing income conditions. Therefore, in the future, a favourable change in the number of births can also be expected among those mothers who give birth for the first time. The decision to have a child will be easier, at least from the economic point of view.

The obtained results confirm the research carried out earlier, in which it had been found that the introduction of government programmes, including the 'Family 500 Plus' programme, reduces the scope of poverty, especially among large families (Maj-Waśniowska & Stabryła, 2002, pp. 95–112).

The continuation of the 'Family 500 Plus' programme and the removal of financial criteria for the support of the first child will have a positive impact also on reducing the extent of poverty among households with one or more children. Only misguided political decisions – as well as a failure

of the public authorities to react to the amount of support (a change in the amount of the childcare benefit, which undergoes devaluation when, with time, its purchasing power weakens) – may neutralise the effects of the ‘Family 500 Plus’ programme, as the financial resources of households are closely linked to their development.

The observed increase in the birth rate does not improve the demographic picture of Poland; it is still unfavourable. The visible trend of a decrease in the number of births, seen in 2018 and also present in 2019, is even more worrying.

The indicators related to birth rates and the extent of extreme poverty in households with children should continue to be monitored and analysed, as financial factors have a significant impact on the planned – and actually employed – family model. The analysis of the presented indicators over a longer period of time will enable the evaluation of the ‘Family 500 Plus’ programme. Such analyses can also be used by those in power for modifying the objectives of the ‘Family 500 Plus’ programme accordingly, i.e. by adjusting this economic instrument of family policy to the changing reality.

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