

Problemy polityki społecznej

POLSKA AKADEMIA NAUK
KOMITET NAUK O PRACY I POLITYCE SPOŁECZNEJ
UNIwersYTET WARSZAWSKI
INSTYTUT POLITYKI SPOŁECZNEJ

Problemy polityki społecznej

STUDIA
I DYSKUSJE

kwartalnik

23(4)/2013

WARSZAWA 2013

Publikacja finansowana przez
Wydział Dziennikarstwa i Nauk Politycznych Uniwersytetu Warszawskiego
i Instytut Polityki Społecznej WDiNP Uniwersytetu Warszawskiego

RADA PROGRAMOWA

Antoni Rajkiewicz (honorowy przewodniczący) (PL),
Józef Orczyk (przewodniczący) (PL), Jolanta Supińska (wiceprzewodnicząca) (PL),
Julian Auleytner (PL), Stanisława Golinowska (PL), Tomasz Inglot (US),
Jeja-Pekka Roos (FI), Cezary Żołędowski (PL)

ZESPÓŁ REDAKCYJNY

Barbara Szatur-Jaworska (redaktor naczelna),
Maria Theiss (zastępca redaktor naczelnej),
Justyna Łukaszewska-Bezulska (sekretarz redakcji),
Piotr Błędowski, Juliusz Gardawski, Ryszard Szarfenberg

Redakcja i korekta tekstów w języku angielskim
Neil Russell

Redakcja i korekta tekstów w języku polskim
Ewa Rydlewska

Redaktor statystyczny
Alicja Maksimowicz-Ajchel

Redaktorzy tematyczni
teoria polityki społecznej – Ryszard Szarfenberg, metodologia polityki społecznej –
Maria Theiss, problemy pracy – Juliusz Gardawski, lokalna polityka społeczna –
Piotr Błędowski,
zabezpieczenie społeczne – Gertruda Uścińska,
polityka ludnościowa – Cezary Żołędowski,
polityka rodzinna – Anna Kurowska

Copyright by
Komitet Nauk o Pracy i Polityce Społecznej PAN i Instytut Polityki Społecznej UW

ISSN 1640-1808

Adres redakcji:
Nowy Świat 67, pok. 110
00-927 Warszawa
Tel./fax 0-22 826-66-52
www.problemyps.pl
problemyps@uw.edu.pl

Nakład 200 egz.

Wersją referencyjną czasopisma jest wersja papierowa.

Realizacja wydawnicza:
Wydawnictwo Wydziału Dziennikarstwa i Nauk Politycznych Uniwersytetu Warszawskiego
Skład i druk: Zakład Graficzny UW. Zam. 77/2014

Spis treści

Od Redakcji.	9
-------------------	---

STUDIA

Barbara Rysz-Kowalczyk, Barbara Szatur-Jaworska, <i>Dobre praktyki w polityce społecznej – istota i rola</i>	15
Piotr Michoń, <i>Nierówności dochodowe w polskich podregionach i ich konsekwencje dla dobrostanu mieszkańców</i>	29
Maria Theiss, <i>Demaskując uniwersalizm obywatelstwa społecznego: rola lokalnej polityki społecznej</i>	41

Z WARSZTATÓW BADAWCZYCH

Piotr Arak, <i>Pomiar rozwoju społecznego na poziomie powiatu i województwa w Polsce</i>	57
Sławomir Kalinowski, <i>Wybrane aspekty sytuacji ekonomicznej wiejskich gospodarstw domowych o niepewnych dochodach</i>	73
Anna Kurowska, Marta Tomaszewska, <i>Zróżnicowanie realizacji uprawnień do opieki przedszkolnej w województwie mazowieckim – w poszukiwaniu politycznych uwarunkowań lokalnego obywatelstwa społecznego</i>	85
Ewa Duda-Mikulin, <i>Migracja jako szansa? Studium przypadku polskich kobiet imigrantek mieszkających w Wielkiej Brytanii oraz powracających do Polski</i> ..	105

RECENZJE

Barbara Rysz-Kowalczyk, <i>Adalbert Evers, Rolf G.Heinze, Thomas Olk (red.), Podręcznik usług społecznych – przykład Niemiec</i>	123
Mirosław Księżopolski, <i>Czy Polska może podążać nordyckim szlakiem?, W. Anioł, Szlak Norden. Modernizacja po skandynawsku</i>	133

Contents

Editorial	11
---------------------	----

STUDIES

Barbara Rysz-Kowalczyk, Barbara Szatur-Jaworska, <i>Good practices in social policy: their essence and role</i>	15
Piotr Michoń, <i>Income inequalities in the Polish subregions and their implications for the well-being of inhabitants</i>	29
Maria Theiss, <i>Unravelling universal social citizenship: the role of local social policy</i>	41

FROM THE RESEARCH AND REPORTS

Piotr Arak, <i>Measuring human development on county and voivodeship level in Poland</i>	57
Sławomir Kalinowski, <i>Selected aspects the economic situation in rural households with precarious income</i>	73
Anna Kurowska, Marta Tomaszewska, <i>Differences in fulfilling the entitlement to pre-school education in Masovian voivodship - in search of political conditions of local social citizenship</i>	85
Ewa Duda-Mikulin, <i>Migration as opportunity? A case study of Polish women: migrants in the UK and returnees in Poland</i>	105

REVIEWES

Barbara Rysz-Kowalczyk, <i>Adalbert Evers, Rolf G.Heinze, Thomas Olk (red.), Podręcznik usług społecznych – przykład Niemiec</i>	123
Mirosław Księżopolski, <i>Can Poland Nordic to follow?, W. Anioł, Szlak Norden. Modernizacja po skandynawsku</i>	133

Od Redakcji

Oddajemy w ręce Czytelników 23 tom „Problemów Polityki Społecznej”. Zawiera on artykuły przygotowane na podstawie referatów, które były prezentowane i dyskutowane na XXXI Konferencji Polityków Społecznych, która odbyła się w 2013 r. w Spale. Mamy nadzieję, że dzięki publikacji w języku angielskim z opublikowanymi przez nas tekstami zapoznają się nie tylko polscy czytelnicy. Autorzy artykułów piszą głównie o polskich sprawach, ale, naszym zdaniem, ich opracowania dotyczą problemów, które mogą być interesujące także dla zagranicznych odbiorców.

Tom zawiera 7 artykułów naukowych oraz 2 recenzje książek. Artykuły poświęcone są różnorodnym tematom. Trzy opracowania zawierają analizy przestrzennych zróżnicowań na obszarze Polski: sytuacji dochodowej i dobrostanu mieszkańców (artykuł Piotra Michonia), wskaźników rozwoju społecznego (artykuł Piotra Araka) oraz dostępności usług społecznych (artykuł Anny Kurowskiej i Marty Tomaszewskiej). W dwóch kolejnych opracowaniach ich autorzy przedstawiają wyniki własnych badań empirycznych: nad wiejskimi gospodarstwami domowymi o niepewnych dochodach (Sławomir Kalinowski) oraz nad sytuacją polskich imigrantek mieszkających w Wielkiej Brytanii i powracających do Polski (Ewa Duda-Mikulín). Obok artykułów mających charakter analiz empirycznych – prowadzonych przy wykorzystaniu bardzo różnych warsztatów badawczych – proponujemy dwa teksty zawierające rozważania teoretyczne. W jednym z nich Maria Theiss analizuje koncepcję lokalnego obywatelstwa społecznego i wskazuje na jej zastosowanie jako perspektywy badawczej w nauce o polityce społecznej. W drugim natomiast Barbara Rysz-Kowalczyk i Barbara Szatur-Jaworska analizują istotę i rolę dobrych praktyk w polityce społecznej oraz proponują zestaw kryteriów dobrych praktyk w zakresie polityki spójności wobec ludzi starych.

Tłumaczenia na język polski opublikowanych w tym tomie artykułów publikujemy – za zgodą Autorów – na stronie internetowej naszego czasopisma.

Redakcja

Editorial

We would like to welcome you to Volume 23 of “Problems of Social Policy”. The journal articles are research projects first presented as papers at the 31st Scholars of Social Policy Conference held in Spała, Poland in 2013. We hope that thanks to the English version, the articles will be read not only in Poland. While the authors write by and large on matters concerning Poland, their insights consider problems that also readers outside Poland might find interesting.

The volume presents 7 scientific articles and 2 book reviews. The articles give insight into a variety of topics. Three papers analyse the location-related differences in income and welfare (article by Piotr Michoń), social development indices (article by Piotr Arak) and availability of social services (article by Anna Kurowska and Marta Tomaszewska). In two further studies, the authors present results of their own empirical research: on rural households with insecure income (Sławomir Kalinowski) and on the situation of female Polish immigrants living in the UK and returning to Poland (Ewa Duda-Mikulín). Apart from empirical analyses, using different research research skills and tools, we would like to present two theoretical texts. In the first, Maria Theiss analyses the concept of local social citizenship, pointing to its use as a research perspective in social policy science. In the second, Barbara Rysz-Kowalczyk and Barbara Szatur-Jaworska analyse the essence and role of good practices in social policy and propose a set of good practice criteria within cohesion policy towards the elderly.

Translations of the articles published in this volume into Polish are published, with the Authors’ consent, on our journal’s website.

The Editor

STUDIA

Barbara Rysz-Kowalczyk

Institute of Social Policy, University of Warsaw

Barbara Szatur-Jaworska

Institute of Social Policy, University of Warsaw

Good practices in social policy: their essence and role

Summary

The article presents with thoughts on the ontological status of good practices, their criteria and the role they play in social policy. The authors describe good practices in three dimensions: as an action aiming at solving a particular problem; as an element of knowledge produced by the organisation; as communication produced by the organisation; The authors review definitions of good practices and their criteria on the basis of secondary sources. They propose to select general and specific criteria of good practices. Specific criteria of good practices are discussed using the example of actions towards social cohesion, taken within the framework of local and regional public policies towards the elderly people. Conceptualizing social cohesion is done with reference to the concept of society for all ages. The authors also propose their own scheme for describing good practices that is meant to ensure their dissemination. The article is concluded with thoughts on the role of good practices in social policy on the micro- and macro-scale.

Key words: good practices, best practices, social policy, criteria for good practices, elderly people

Introduction

“Good practices” is a term widely used thanks to the European Union and which became extremely popular thanks to the EU bureaucracy. It can be found in legislative acts, in the policy papers of various organisations (including international ones), in the documents of applications for state resources, in contest tag-lines, in scientific papers. Everybody talks about good practices, some take pride in creating them, but they do not always have the same thing in mind. Most of all, the difference should be considered between:

- the term “good practices”, relating to actions aimed at solving a particular problem, and a set of deontological principles that ought to be adhered to in particular institutions or professions;¹
- between *good practices* and *best practices*;
- between the business and non-business approach to good and best practices.

In our judgement, despite a high number of publications on examples of good practices, Polish papers tend not to conceptualize the term, while some authors even fail to provide their selection criteria for good practices. In the present paper, we are thus attempting to answer the following question: what are good practices and what is their ontological status? We can distinguish three possible approaches to this category:

- 1/ good practice is an actual action, aimed at solving a particular problem;
- 2/ good practice is an element of knowledge produced by an organisation;
- 3/ good practice is communication.

The next question tackles the criteria an action should fulfil to be considered good practice, the conditions to be met by a description and a means to select good practices to diffuse them further.

When looking for criteria to be met by a good practice in social policy, as a starting point, we have adopted the notion that diversified social needs, particularities in the characteristics of various social groups and complicated conditioning of social problems cause the need for double criteria: a set of criteria useful when assessing different actions in the scope of social policy and specific criteria, which take into account the particularities of groups and problems tackled by the actions which are (or are not) to become a good practice. Whilst trying to establish a definition of good practice in social policy, we will propose general and specific criteria (relating to a particular area). The article concludes with thoughts on the role played by good practices in social policy.

¹ The example sets based on such understanding of this notions are “Good Practices in Polish Stock Exchange Companies”, the European “Code of Good Administrative Behaviour”, “A Code. Good Practices in Higher Education”.

Good practice as action

Performing a simple analysis of the term good practices on the basis of the basic meanings of the words it contains, we can generally notice that it concerns something that is a practical action (that brings particular effects, causes a change on the individual, collective or institutional level) and is judged positively (although it is not clear according to which values and criteria).² The action, thus understood, comprises both different types of actions taken by people, methods of operation, tools used and organisational solutions. Furthermore, the term “good practice” is used in two meanings. In its broader meaning, good practice is simply “something that works”, something that has proven successful. In the more narrow meaning, good practice is only that which matches very particular criteria. These criteria refer to numerous and varied values, while the objective scope of good practices (that is, the discipline within which the deliberate action is taken) is very broad. When reviewing descriptions of good practices in social policy, one may conclude that the narrower sense of the term is generally used.

For example, the website of the “Structural Funds for Development” project features the following definition: good practices are *innovative projects that were successfully implemented in communes and regions. They constitute practical solutions to particular problems and bring definite, positive results.* (www.dobrepraktyki). Innovativeness is also the key feature of good practices for Dobroniega Trawkowska, who, when looking to answer the question on what good practices in social security are, proposed the following definition: “(...) good practice is (...) a process of creatively adopting normative innovation in different social systems, its key determinant being the presence of empowerment processes of different groups and social circles. The two features of good practice are: reactivity and creativity (grassroots activities, sensitivity to context and particular needs, the ability to define problems and hidden needs, creative action strategies).” (Trawkowska 2012: 30). Other definitions stress productivity and not innovativeness: “Generally speaking, good practices could be defined as processes or methods that result in increased productivity when applied successfully. Good practices are not new solutions; they are actions verified in practice, previously applied in other organisations. (...) Good practices for an organisation are solutions and actions that lead to better results when implemented.” (Matusiak 2008). A similar approach is shown in the UNDP definition: “good practices are all cyclical or singular actions that aim to perform tasks effectively and achieve goals, and also fulfilling the following conditions: their use of resources is effective; they may be employed in many organisations. Therefore, good practices need to be efficient, effective and universal”. (UNDP). A corresponding view is presented by Anna

² Here, it would be advisable to quote the notion of D. Trawkowska, who observes that abandoning the actions that are routine, unsuccessful or dysfunctional towards the system may also constitute good practice. (Trawkowska 2012: 29)

Karwińska and Dobrosława Wiktor: «[good practices are] regulations and projects that result in good or very good results for the organisation» (Karwińska, Wiktor 2008:8).

As the quality of actions and solutions needs to be assessed with regards to varied assumptions and the conditions in which they are implemented, a single, universal “recipe” for a good practice does not exist. Description and analyses of good practices, as well as administrative documents, often contain a varied set of their desired qualities and criteria of different length. Below is the synthesis of the features cited most often³:

- good practice leads to fulfilling the planned goals;
- good practice can be transferred to a different area and applied by a different entity;
- good practice is not a result of habits, but of prior reflection; it is subject to formalization and as such, is transparent and may be evaluated so as to its methods and effects;
- good practice is innovative;
- good practice involves optimum use of resources;
- good practice can be subject to external evaluation (its aims, process, products and effects are quantifiable) and has been assessed positively in accordance with the principles of evaluation;
- good practice ought to be a source of knowledge for others, should be expressible in the formula of a model;
- good practice should be a solution to a current problem and simultaneously, should be applied over a longer period of time (although it is also suggested that one-off projects also be included);
- good practice should be transparent;
- good practice should be based on cooperation of different entities;
- good practice should fulfil legal requirements;
- good practice should be economically realistic, that is, implementing it should not require above-average investment,
- good practice should bring social advantages to the beneficiaries of particular actions and larger communities;
- good practice should be accepted by the professional community working in a particular field of public policies.

Actions of different entities might be considered both *good practices* and *best practices*. Neither science, nor practice offer a set means of telling these two notions apart. However, it appears undoubted that unlike good practice, best practice is a relative concept, for good practice only becomes best when compared to other practices.

³ Cf. i. e. : IGAS (2006); Karwińska A., Wiktor D.(2008); *Poradnik...* (2008); *Zbiór dobrych praktyk...* (2012); www.dobrepraktyki.decydujmyrazem.pl (2013); *Kryteria...* (2013); www.umbrella.org.pl (2013); *Model ewaluacji...* (2010); Trawkowska D. (2012); Anne A. (2003); DuPasquier A.(2006); www.fao.org/knowledge/goodpractices/gp-definitionsandcriteria/criteriaforgoodpractice/fr/;

Good practice and best practice as elements of organisational knowledge

It also appears that the term “best practice” is more applicable to economic activity (technology, organisation of production and management) than the world of politics, administration or the functioning of non-governmental organisations. Best practice should, after all, be understood as one that has proven to lead to best results. Therefore, to be identified, best practice requires comparisons, measurements and use of precise indicators (more often quantitative than qualitative). Therefore, as indicated by Krzysztof Rutkowski, best practice in business activity “leads to results giving competitive advantage in a given time, and guarantees success in business over a period of time. With time, it is analysed, overtaken and applied by other companies as a role model, and unless it undergoes major changes, it becomes good practice (...).) However, if the company that implemented good practice shares the belief in constant improvement (...)) best practice may evolve and remain a paragon for its competitors for a longer time by “escaping forward”” (Rutkowski 2006: 2)

The examples of good practices in databases analysed by us demonstrates that in the scope of non-business actions that may be included in public policies (including social policy). good practice should mainly lead to the “expected” (positive) result. It does not have to be the best. Therefore, a status of good practice may be enjoyed by more than one solution to a given social problem, provided that each of them leads to similar results judged as positive.

Nevertheless, best practices also have an important place in social policy whenever learning from the best is concerned, i.e. when applying the open method of coordination and *benchmarking* (cf. SIRMA 2007). “The OMC has provided a framework for exchange and learning and has promoted openness, transparency and the involvement of stakeholders, European and national, as a means to better policy-making” (OMK (2005) 706). *Benchmark*, on the other hand, is a standard or reference point for comparisons or evaluation. Best practices are examples of such “reference points” for planning or assessing actions in social policy or in other public policies. Dissemination of knowledge on best solutions is done by an exchange of information between various entities. At the same time, it is underlined that the aim of *benchmarking* in public policies (including social policy) is not only imitating best initiatives and solutions, but also creating a framework “against which success and failure of different policy or management approaches can be understood” (SIRMA 2007:8). Such are the guidelines of *benchmarking* in public policies, which does not mean that in this method raises no doubts in practice, both in terms of concept and its realization.⁴ In the following part of the article, in accordance with the distinction made above, we will only take good practices into consideration.

⁴ Cf. i.e. Bruno 2008.

According to Andrzej K. Koźmiński and Dariusz Jemielniak, the knowledge embodied in good practices is an intangible asset of each organisation. It is the most decisive factor in competitive advantage. This advantage “results from the uniqueness of a knowledge asset in possession of a given organisation, and from particular abilities to use that asset.” (Koźmiński, Jemielniak 2008: 260). In view of organisational and management theories, when transmitting a part of knowledge as information on good practices, the organisation loses its uniqueness, and as long as the entities in its environment are able to learn and apply changes, the organisation loses its competitive advantage (*ibid.*) Therefore, why do organisations decide to describe and disseminate good practices?

The stake of all entities that disseminate a part of knowledge on their activity as good practices is building their positive image. Thus, good practices are part of *public relations*.

In the case of institutions and organisations operating in the field of social policy, the “competitive advantage” is the ability to obtain resources (most of all, from public sources), partners, clients and employees which may contribute to their leading position on the “market” of good practices. Good practices are a kind of “good” that do not reward their producer with payment from the purchaser (an entity imitating the good practice), but contribute to a better “market position” when disseminated. Social policy institutions are, after all, not only oriented towards solving social problems, but also have their own stake in the continuance and development of the organisation and in enabling professional careers for the personnel it employs. The organisation that endorses good practices may legitimize its actions towards the donors, securing them in the belief that their resources have been well-allocated. Besides, being the leader in good practices facilitates partnerships with “strong” entities, which facilitates achieving success.

It is worth underlining that focusing on the image-related function of good practices may lead to misunderstanding them. It is stressed by D. Trawkowska, who describes the search for “image-enhancing”, newsworthy initiatives, which are subsequently granted the status of good practice for that very reason, and encoded in the organisational culture of some social policy institutions (Trawkowska 2012: 22).

Generally speaking, the “trade” in good practices leads to social policy institutions better meeting the needs of their clients. After all, the more institutions doing something equally well, the better. Nobody loses in the process, on the contrary - mistakes are avoided, and therefore, the cost of meeting social needs diminishes.

Good practice as communication

When talking about good practice as communication, we deal with three types of actors: providers, promoters and receivers. Receivers are entities that implement and describe a given practice. Promoters may be providers themselves, yet also other entities that contribute to the dissemination of a good practice, e.g. competition organizers and sponsors, journalists. Receivers are stakeholder organisations.

Descriptions of good practices often have a loose, unstandardised structure (i.e. during presentations at conferences). These descriptions may also be made in accordance with a set scheme, for example, in the Internet good practice databases or in descriptions for good practice competitions. They are generally spoken accounts, often enhanced with graphics, photos or films. Below is a list of topics and questions that appear in good practice description forms and are also suggested in handbooks⁵:

- describing the situation before implementation;
- establishing a problem that led to creating the solution and taking action;
- describing the context of the action, e.g. their spatial dimension, legal and cultural environment;
- characteristics of the target group;
- aims of actions (of institutions), described as good practice
- description of actions (of institutions, procedures), including presentation of implementing parties, time and place of actions, distribution of task, management type, use of information and promotion tools;
- analysis of investments (costs);
- description of results obtained, including evaluation of their sustainability;
- a balance of profits (advantages) and disadvantages (inconveniences);
- plans for future actions within the described good practice;
- Recommendations for entities interested in replicating the practice, e.g. How to start?;
- actions taken vs. the principle of gender equality;
- Cooperating with civil society on implementing the action described.
- In our opinion, the description standard for good practices in the scope of social policy should contain the following elements:
 - name, summary and aim of the project;
 - the results obtained;
 - description of the project's stages (with their execution time);
 - employed tools and means of action;
 - actors (beneficiaries, organisational units, partners of self-governments);
 - investments made (money, personnel, working time, space used, devices, etc.)
 - evaluation and self-evaluation (strengths/advantages; weaknesses/possible difficulties);
 - initial conditions (e.g. resources required, competencies);
 - experience of implementing a good practice in a different time and place, if applicable.

⁵ They dealt with methods and procedures of indicating social emergency among children (IGAS 2006), cooperation between public administration and the third sector (Mocek 2011), projects financed by the ESF), subjects of social economy (Karwińska, Wiktor 2008); good practices in age management (Liwinski 2010), good practices in clusters ([www. pi.gov.pl/parp/](http://www.pi.gov.pl/parp/) 2013), good practices in EQual Community initiative (Katalog... 2008).

The practice for activities that lead to the acknowledgement of an initiative, institution or procedure as good practice and promote it as such is very varied. Competition judges, expert panels, and even the creators of actions evaluated as such, decide on what is presented as good practice. The channels of disseminating the message on good practice includes, most of all, the Internet, yet also book publications, articles in periodicals, speeches at conferences and seminars. The communication providers are usually institutions, and the “target group” are other organized entities. These communications usually appeared in specialized media (the websites of specialist institutions, professional periodicals). On the other hand, they are rarely present in the media outside the social policy implementer circle. This is one of the reasons for the low level of knowledge of new and valuable findings offered by social policy institutions among citizens.

From the point of view of communication receivers, communication may have two meanings. Firstly, it can be viewed as a description of a role model. Secondly, receivers may take this description as an inspiration to seek their own, original solutions.

Good practices in social policy: suggested criteria

The analysis of reference books and example databases of good practices demonstrates that the criteria they mention repeats to some extent, while in the remaining part, these criteria strongly refer to the characteristics of the subject of the analysis. Therefore, we assume that it is justified to divide the good practice criteria into general criteria, suitable for evaluating actions in each area of social policy, and criteria specific to a particular area. For example, the area for which we propose specific criteria are actions encouraging social cohesion within the framework of local and regional public policies towards elderly people.

General criteria

We suggest the following general criteria for good practices in social policy:

- proven (and not potential) effectiveness in solving a particular problem, obtaining results that coincide with the assumed aims of the project;
- methodicalness - describable methods, forms, stages and results of actions;
- repeatability: the ability to implement a given solution in another place and time;
- adaptability: proneness to adaptive changes in different conditions, with no loss in quality;
- transparency: overt actions,
- ethicalness: ethical action;
- rule of law: lawful activities;
- economic effectiveness: a profitable relation of investments to effects.

We stand for the notion that this is a complete set of criteria to consider a particular action good practice in social policy. It is therefore necessary for an action

to fulfil each of these criteria. On the other hand, in our opinion, it is not necessary for them to fulfil other criteria, such as sustainability of the result, planned character or innovativeness (although they are often cited), as in exclusion prevention programmes, for example, establishing new bonds, gaining new abilities and developing positive habits often prove more important than sustainable results (e. g. maintaining employment). What is more, some inclusive actions are social emergency actions (i.e. providing shelter for the homeless, providing meals for dependent persons) and they are not, in their essence, meant to bear long-time effects. Also, good practices are not always the effect of planned actions, they might be created spontaneously, like in the case of local forms of cooperation between sectors. Moreover, it does not seem justified to expect innovativeness from every good practice, most of all because innovativeness is a relative concept. What one entity considers innovative (original and new) might be treated as a modification of already known solutions. Moreover, if one is to assume that social innovation is supposed to lead to a change in social relations and stimulate sustainable development, actions that serve social stability could not be considered good practices. The aim of these actions (although not exclusively) would therefore decide on whether they could be evaluated as good practices or not.

On the other hand, it is relevant to distinguish a separate category of innovative good practices, in which the actors do not only opt for effectiveness and sure results, but also for solutions that are new and original in different aspects and contribute to social change. The aim of social innovation is to find new answers to new social needs, or to those which are unsatisfactorily met by current social policy in current market conditions by including the participation and cooperation of actors they involve, with particular focus on receivers, the addressees of these actions. Innovations cause considerable qualitative changes. Their character is intentional and planned. Innovations apply both to products and services and means of organisation, distribution. (*L'innovations sociales...* 2012; Anne 2003). Social innovations may, yet do not have to be, good practices. Good practices may, but do not have to be, innovative.

Specific criteria as found in social cohesion policy towards elderly people

Establishing specific criteria for good practices requires conceptualization of the terms used to describe the subject of analysis. The subjective scope of actions towards social cohesion taken towards the elderly, who we set as an example, may be defined in different ways. For example, referring to the priorities defined in the National Strategy Report on Social Protection and Social Inclusion 2008-2010 and taking this document as an example of operationalisation of the concept of “social inclusion” for practical reasons, it can be assumed that the areas of social inclusion for elderly people are: their material standing (limiting poverty), activation and enabling access to high-quality social services. Other examples of describing and evaluating inclusive actions towards elderly people (in local environments) have been established within

the international World Health Organisation “Age-Friendly Cities” programme. This programme assumes that actions including the elderly in their local environments comprise the following areas: outdoor spaces and buildings; transportation; housing; social participation; respect and social inclusion; civic participation and employment; communication and information; community support and health services. (Guide... 2007). International and Polish documents on social participation of elderly people and including them in social life contain yet another approach to this matter. Very often, they refer to the concept of society *for all ages* (Szatur-Jaworska 2003).

We suggest that the subjective scope of policy for social cohesion of the elderly be defined with reference to the latter concept, as it stresses the importance of inclusive measures and promotes participation of elderly people in various areas of social life. These areas were placed in the first column of Table 1, whereas specific evaluation criteria of action taken, ascribed to each of the areas, are shown in the second column.

Table 1. Specific criteria for good practices in the cohesion policy towards elderly people

area	Criteria	comment
life-long learning	availability and adequacy	using different forms and techniques of knowledge transmission and practising abilities; adaptation to specific characteristics of recipients
maintaining social capital resources and prolonging working life (working with employers towards implementing an age management strategy)	optimal use of the elderly people's potential	preventing the waste of resources, purposeful use of particular qualities (experience, wisdom, empathy, time...)
integrating generations in education, culture, political activity and voluntary work experience; preventing self-exclusion and isolation of elderly generations	multi-generationalism	activating representatives of all generations in the same activity
creating an old age-friendly public space (transport and places of general interest)	– versatility – placement of facilities is adequate to the area's spatial structure	old-age friendly space is also friendly to younger people
enhancing physical well-being, fitness, physical and social activity of older generations	the offer corresponds with physical ability of participants, based on a fair diagnosis	elderly people suffer from different conditions and experience physical barriers; the activation offer must be „tailored”

supporting services enabling the needs of persons reliant on care to be met in their homes	<ul style="list-style-type: none"> – working with families of the elderly – multi-sector collaboration – better use of already existing resources of local social infrastructure 	it is common in geriatric care to call for keeping elderly people in their homes as long as possible, and build support networks based on the potential of local environment and families
using information technology for social inclusion (communication and education platforms) and better social services (long-distance medical care, telephone applications, etc.)	giving elderly persons a sense of security in the world of new technologies	giving a sense of security in learning and using new technologies in e-services and e-government; giving a sense of security thanks to new technologies

Source: own work

The role of good practices in social policy

The meaning of good practices in social policy may be determined by macro-level analysis, taking into account the goals and operational means of social policy, as well as in micro-level analysis from the point of view of the social policy institutions that develop good practices and those which use them (in particular, local government units and their partners in implementing public policies).

On the macro level, the role of good practices in social policy (as actions and communications) is most of all their application as instruments that facilitate converging social policies in different EU member states. They may also be a useful instrument when coordinating collective actions within the framework of public policies does not only refer to hierarchy and/or market, but also to coordination networks.⁶ It is also worth underlining that the exchange of good practices is useful for perfecting the social policy system, however, on the condition that the message is holistic and does not only concern the “practice” itself, but also its connections within and outside the system.

Communication on good practices may have an explanatory function for ambiguous and vague terms that describe the aims and objectives of social policy. The example of such terms include: activation, social cohesion or intergenerational solidarity. Descriptions of good practices add empirical substance to these terms and contribute to disseminating their more precise definitions, even if these definitions are not formulated directly, but are interpreted each time from actions undertaken to achieve a particular aim. For example, putting an impact on promoting educational and recreational initiatives as good practices activating retired persons narrows the defini-

⁶ Types of collective action coordination in: Kozuch (2004: 35).

tion of activating retired persons to encouraging their educational and recreational activity and sociability.

When good practices concerns social services, the question arises of their relation to service standardisation, as dissemination of good practices and service standardisation have a common goal: to improve the quality of work of social policy institutions. It appears that the analysis of good practices (of course, not singular ones, yet a larger set thereof) may constitute a basis for building standards and choose what is necessary to obtain good service quality. At the same time, analysing good practices should also demonstrate the necessary degree of freedom that social service providers should have the right to, as it sometimes happens that when involving excessive, detailed regulation, standardisation can become a barrier for solutions that might have become good practices.

Other than being a part of *public relations* that can be exchanged for a better position in competing for funds and partners, good practices are an important part of the process of learning in organisations for the organisations that “yield” them. It means getting to a higher level of organisational self-reflection than the observing particular behaviour and describing it.

On the other hand, from the point of view of an organisation that receives good practices, they may contribute to their development, however, on condition that these organisations have the ability to learn. Foreclosing good practices may also endorse proper functioning of organisations, most of all, in short term, that is, facilitating adaptive changes. Moreover, for an organisation using good practices, they are one of the important sources of knowledge on the steps of their competitors, helping them to “get to know the market”. They are also an instrument of quality management in the organisation.

To conclude, it is worth mentioning that “bad practices” also occur in the process of implementing social policy. Identifying, classifying and disclosing them appear just as important as promoting the practices evaluated as good, and also requires conceptualising evaluation criteria, methods of identification and description. An action that does not comply with good practice criteria cannot be evaluated as bad practice solely for that reason.

References

- Anne A. (2003), *Conceptualisation et dissemination des «bonnes pratiques» en éducation : essai d'une approche internationale à partir d'enseignements tirés d'un projet* (in:) C.Braslavsky, A.Anne, M.I.Patiño, *Developpement curriculaire et «bonne pratique» en éducation*, Serie de documents du BIE – 2, Genève.
- Bruno I. (2008), *La recherche scientifique au crible du benchmarking. Petite histoire d'une technologie de gouvernement*, «Revue d'histoire moderne et contemporaine», 5-55-4bis, p. 28-45.

- DuPasquier A. (2006), *Critères de sélection de bonnes pratiques en matière de développement durable et application à quelques exemples du domaine de l'eau dans le cadre d'Agendas 21*; digital version: <http://www.unil.ch/webdav/site/ouvdd/shared/Colloque%202006/Communications/Eau/Bonnes%20pratiques/A.%20DuPasquier.pdf> (15.09.2013)
- Guide mondiale des villes-amies des aînés* (2007), OMS (WHO); digital version: whqlibdoc.who.int/publications/2007/9789242547306_fre.pdf (3.10.2012)
- IGAS (2006) *Recensement et analyse des bonnes pratiques en matière de signalement, dans le cadre de la politique de protection de l'enfance* ; digital version : www.ladocumentationfrancaise.fr/rapports-publics/064000257-recensement-et-analyse-des-bonnes-pratiques-en-matiere-de-signalement-dans-le-cadre-de (25.02.2013)
- L'innovations sociales – un levier pour développement des territoires* (2012) ARF, Awise, Paris 2012: 6 ; digital version : www.esseregion.org (17.03.2013)
- Karwińska A., Wiktor D. (2008) *Przedsiębiorczość i korzyści społeczne: identyfikacja dobrych praktyk w ekonomii społecznej*; digital version: es.teksty.ekonomiaspoleczna.pl/pdf/2008_6_es_teksty.pdf (3.03.2013)
- Katalog dobrych praktyk inicjatywy wspólnotowej EQUAL* (2008), Fundacja Fundusz Współpracy, Warsaw; digital version: www.equal.org.pl/download.php?Mod=kompedium&FID=74 (3.04.2013)
- KOM (2005) 706, *Pracując razem, pracując lepiej: Nowe ramy otwartej koordynacji polityk ochrony socjalnej i integracji społecznej w Unii Europejskiej*, Communication from the Commission to the Council, the European Parliament, the European Economic and Social committee and the Committee of the Regions, Brussels, 22.12.2005.
- Koźmiński A.K., Jemielniak D. (2008) *Zarządzanie od podstaw. Podręcznik akademicki*, Wydawnictwa Akademickie i Profesjonalne, Warszawa.
- Kozuch B. (2004), *Zarządzanie publiczne*, Placet, Warszawa.
- Krajowy Program Działań „Zabezpieczenie społeczne i integracja społeczna na lata 2008-2010”*; digital version: http://www.emeryturypomostowe.gov.pl/sites/default/files/4/program_zabezpieczenie_spoleczne_2008-2010.pdf (15.03.2013)
- Kryteria dobrych praktyk w zakresie bezpieczeństwa i zdrowia pracy*; digital version: <http://osha.europa.eu.pl> (4.10.2013)
- Liwiński J. (2010) *Opis dobrych praktyk dotyczących zarządzania wiekiem w przedsiębiorstwach polskich oraz innych krajów UE*, PARP, Warsaw; digital version: www.zarządzaniewiekiem.pl/index.php?option=com_phocadownload&view=category&id=2&Itemid=26 (3.05.2013)
- Matusiak K.B. (ed.) (2008) *Innowacje i transfer technologii, Słownik pojęć*, PARP, Warsaw.
- Mocek S. (ed.) (2011) *Dobre praktyki współpracy między administracją publiczną i organizacjami pozarządowymi (z wykorzystaniem analizy jakościowej)*, Collegium Civitas, Warszawa.
- Model ewaluacji w pomocy społecznej. Raport z badań* (2010) Małopolskie Obserwatorium Polityki Społecznej, Kraków.
- Poradnik dobrych praktyk w zakresie zrównoważonego rozwoju* (2008), digital version: www.fundusze_strukturalne.gov.pl (4.10. 2013)

- Rutkowski K. (2006) *Zrozumieć fenomen najlepszych praktyk w logistyce i zarządzaniu łańcuchem dostaw. Europejskie wyzwania projektu BestLog*, „Gospodarka Materialowa i Logistyka”, vol. 12.
- SIRMA (2007), *Podręcznik dobrych praktyk regionalnych w e-administracji. Wskaźniki i benchmarking*, Tarnów.
- Szatur-Jaworska B. (2003) *Społeczeństwo dla wszystkich grup wieku – prezentacja koncepcji*, „Praca Socjalna” vol. 2, p. 24-35.
- Trawkowska D. (2012) *Koncepcje i wyznaczniki dobrych praktyk w pomocy społecznej* (in:) A.Bartoszek, K.Czekaj, K.Faliszek, A.Niesporek, D.Trawkowska, *Instytucje wsparcia a monitoring problemów społecznych w Katowicach. Księga Dobrych Praktyk*, Urząd Miasta Katowice, Katowice, p. 18-30.
- Zbiór dobrych praktyk. Wdrożenie zarządzania satysfakcją klienta w 100 urzędach administracji rządowej* (2012) KPRM, Warszawa.

Websites

- www.dobrepraktyki.org.pl/page/dp3.html (1.04.2013)
- www.dobrepraktyki.decdujmyrazem.pl; tab: Co nazywamy dobrą praktyką (4.10.2013)
- <http://www.fao.org/knowledge/goodpractices/gp-definitionsandcriteria/criteriaforgoodpractice/fr/> (2.04.2013)
- UNDP, www.undp.org (1.04.2013)
- www.owop.org.pl/media/filmy/html (3.04.2013)
- [www. pi.gov.pl/parp/](http://www.pi.gov.pl/parp/) (3.10. 2013)
- www.umbrella.org.pl/baza/ (5.10.2013)

Streszczenie

Artykuł zawiera rozważania na temat ontologicznego statusu dobrych praktyk, ich kryteriów oraz roli w polityce społecznej. Autorki charakteryzują dobre praktyki w trzech wymiarach: jako działanie służące rozwiązaniu jakiegoś problemu; jako element wiedzy wytwarzanej przez organizację; jako komunikat wytwarzany przez organizację. Na podstawie zastanych źródeł autorki dokonują przeglądu definicji dobrych praktyk i ich kryteriów. Proponują wyodrębnienie ogólnych i specyficznych kryteriów dobrych praktyk. Specyficzne kryteria dobrych praktyk omawiane są na przykładzie działań na rzecz spójności społecznej podejmowanych w ramach lokalnych i regionalnych polityk publicznych wobec ludzi starszych. Konceptualizacja spójności społecznej jest przeprowadzona poprzez odwołanie się do koncepcji społeczeństwa dla wszystkich grup wieku. Autorki przedstawiają także własną propozycję schematu opisu dobrych praktyk, który ma zapewnić ich upowszechnienie. Artykuł zamykają rozważania dotyczące roli dobrych praktyk w polityce społecznej – w mikro- i makroskali.

Słowa kluczowe: dobre praktyki, najlepsze praktyki, polityka społeczna, kryteria dobrych praktyk, osoby starsze

Piotr Michoń

*Department of Labour and Social Policy
University of Economics in Poznań*

***Income inequalities in the Polish subregions
and their implications for the well-being
of inhabitants***

Summary

The neoclassic economic model assumes that individual's utility level depends on individual's or her family's absolute income. Homo economicus does not compare his income with the income of others. However, number of recent studies suggest the existence of a negative impact of income inequality on the level of subjective well-being. Using the data from Social Diagnosis 2011 the paper aims at measuring the relation of income inequalities in Polish subregions and the level subjective well-being of their inhabitants. The results of the study are not conclusive and do not provide strong arguments either for rejecting or accepting the hypothesis of the negative effect of social inequalities in subregions on subjective well-being.

Key words: income, income inequalities, social comparison, happiness, subjective well-being, satisfaction with life, quality of life, Poland, subregions

Introduction

In *The Theory of Moral Sentiments*, Adam Smith [1759, 1982] pointed out that people are more likely to sympathize with our joy than with our sorrow, and therefore we praise our richness and conceal our poverty. Karl Marx [2006] showed that our desires and pleasures are rooted in society, which is why we measure their achievement in relation to society, and if so, they are of social, relative nature. “Our wants and pleasures have their origin in society; we therefore measure them in relation to society (...) Since they are of social nature, they are of a relative nature” [Marx 2006; 33] and he adds: “it is self-evident that wages can only be said to be high or low as compared with a standard by which to measure their magnitude” [22]. The *Social Limits to Growth* Hirsch [2005] drew our attention to positional goods that are consumed by those who are higher in the social hierarchy. The important characteristics of positional goods, is that they bring the utility of consumption partly because they are available only to a few. “In the *Trial of Inequality*” Jean-Jacques Rousseau [1956, 48] wrote: “Each one began to consider the rest, and to wish to be considered in turn; and thus a value came to be attached to public esteem. Whoever sang or danced best, whoever was the handsomest, the strongest, the most dexterous, or the most eloquent, came to be of most consideration; and this was the first step towards inequality, and at the same time towards vice. From these first distinctions arose on the one side vanity and contempt and on the other shame and envy: and the fermentation caused by these new leavens ended by producing combinations fatal to innocence and happiness.” Each of these great scholars and many others (e.g. Veblen 2008, Duesenberry 1952) sees the role social comparisons play in the process of evaluation of our situation. Despite strong evidence of the impact of comparisons on individuals in most economics textbooks dominates belief that the welfare of an individual is determined by the individual situation (material) and the relative position has no significant role. Of course, today’s economists are aware of the fact that man has a relative position, but their works are mainly based on the atomistic utility model.

Many researchers emphasize that the distinction between the absolute and relative grasp of utility has significant implications for the perception of an individual’s well-being. If utility depends on relative consumption, the growth of one’s consumption, leads to externalities in the form of reduction of relative consumption of others [Luttmer 2005; Frank 2007; Michoń 2013]. Additionally, the distinction of absolute and relative sources of utility can be observed in the discussion on (measurement) poverty. Understanding how inequalities affect the social well-being might play a significant role in the discussion on the redistribution of income and the objectives and instruments of social policy.

Social comparisons

More than half a century ago, Leon Festinger [1954] published his famous and prominent paper on social comparisons. Nowadays, the theory of social comparison is very extensive and used in various areas of scientific inquiry. Let's focus on the most important elements of social comparison theory from the perspective of the paper's goal. What does social comparison theory tell us about the impact of other people on our subjective well-being? First, in many situations, people compare each other, and, as suggested by some studies, sometimes we do it completely unconsciously. Secondly, an individual compares themselves mostly with people he or she knows; who represent that person's reference group. Thirdly, the reference group consists of people who are in some way important to the individual and who belong to the "same league", i.e. siblings, friends, neighbours, colleagues, parents. Fourth, upward comparison (e.g. with those who earn more than we do) may result in two ways: reduction of subjective well-being and/or by increasing the motivation to climb higher in the social (income) hierarchy. Fifth, downward comparison, (e.g. with those earning less than we do) increase the level of life satisfaction. Sixth, income level evaluation depends on the results of social comparisons. Seventh, in addition to comparison with others, we compare ourselves to the past (temporal comparison).

The perception of inequalities

Psychologists point to the fact that man uses cognitive schemas, simplifications that make easier our daily functioning. One of these schemes; availability heuristic, understood as a tendency to formulate judgments on the basis of readily available information makes people think that people of high status are likely to overestimate the number of members of their group and assess society as "rather" egalitarian. Meanwhile, individuals representing people with low status are convinced that the number of poor people in society is much higher than it is in fact, and they are convinced that they live in a country of large inequalities. Thus, the reference group affects how the person perceives the social stratification [Evans, Kelly, Kolosi 1992]. The rich and successful see others as rich and successful, and the poor, conversely, perceive others as poor. People tend to carry their own social status to others. Man categorizes the collected information always when it is only possible. Information about social status is usually readily available, so that it forms a basis for cognitive categorizing [Hollander, Howard, 2000]. Social position also plays an important role in shaping the identity of the individual. We think of ourselves through the prism of how we assess our place in a group.

People with similar attributes act and even think differently when the situation around them is changing. Durkheim was one who found that Protestants are less likely to commit suicide when they live in a catholic country than when living in protestant countries, and Coleman said that poor children learn better when getting into

a school for children of the middle class than when they go to school for poor children [Carter 1991]. What does this mean in the context of income inequalities and their relation to welfare? One does not have to experience inequalities that occur at the macro level, but certainly we are affected by the daily experience resulting from direct contact with our environment.

Income inequality and well-being

Using panel data in his research Luttmer [2005] noted that the decline in the individual's (household's) income led to a reduction in the level of declared happiness. This result is in line with the traditional economic model. But it is not true, in case of the next Luttmer's conclusion [2005]: an increase in income in the neighbourhood (while one's income remains unchanged) also led to a decline in happiness of the individual. In both cases, i.e. when the personal income fell and when it remained unchanged but neighbours earned more; Luttmer observed a strong negative impact of the change on individuals' happiness.

The relationship between inequality of income and the level of subjective well-being depends, as suggested by Alesina et al. [2004], on the level of concerns for inequalities and the belief that individual effort can move people up the income ladder (social mobility). In this model, the attitude towards inequality and perceptions of mobility act as a buffer, or more formally: a mediating variable. When we consider that income inequality is a desirable/acceptable phenomenon, and at the same time we believe that everyone can climb up the social ladder if only the person makes sufficient effort and/or because of her talent, the presence of income inequality may even contribute to the growth of human happiness. On the other hand, those who prefer equality and are concerned that climbing up the social ladder is extremely difficult, almost impossible, experience a decrease of subjective well-being when faced with high levels of income inequalities. In accordance with the views Europeans are culturally unhappy about inequalities while Americans are more favorable to them [Alesina et al. 2004] (and this despite evidence that social mobility in the U.S. is lower than in most OECD countries). Simultaneously, the authors state that income inequalities are important for individual's happiness if they pose a threat to the future situation of the individual. Thus, income inequality in the United States seems more threatening to the happiness of relatively wealthy persons. There is a lot of risk that they will experience a deterioration of their situation (lower place in the social hierarchy). In Europe, inequality affects mainly the poor, who do not see their chances to improve their relative position [Alesina et al. 2004].

Reflecting on the mechanisms of how the income inequality affects individuals' subjective well-being Simone Schneider [2012] directed our attention to the cognitive processes associated with the perception of inequality. Analysing the responses of German respondents the author points out that it's not so much the perceived level of inequality, but its legitimacy, which is important for individuals [Schneider 2012].

To put it another way: if we perceive income inequality but assess it as well-deserved, or if the mechanism leading to the formation of inequality is seen as a fair one; the existence of inequality will not have a strong impact on our well-being. A study conducted by Schneider points out that it is not about objective differences in income levels that are important for our subjective well-being, but it is how we perceive the (estimated) inequality [Schneider 2012]. We see here a reference to the distinction between distributive and procedural justice, which represents an important topic in the studies of organizational behaviour.

Verme [2011] examined the relationship between inequality of income and life satisfaction at the country level. Stipulating that the results may be misleading due to numerous methodological limitations, the author suggested the existence of a negative impact of income inequality on the level of satisfaction with life. Studying Latin America Graham and Felton [2006] came to the conclusion that income inequalities have a very significant impact on well-being. The authors pointed out the lack of correlation between the average income in the country (and in particular cities) and the well-being of its residents (with the exception of the smaller, poorer cities). The relationship between inequality of income and happiness was also studied by Gandelman and Porzecanski [2013]. Using data from Gallup World Poll they found that differences in the level of happiness are less vivid than the differences in income inequality, and according to the authors this represents proof for a decreasing utility of income [Gandelman, Porzecanski 2013]. Clark [2003] used the British panel data to explore the consequences of the income distribution in the reference group for life satisfaction of the full-time employed. The conclusions of the study: as the average income of the reference group grows, the individual's well-being decreases, and at the same time well-being is positively correlated with the level of inequality in the reference group. Clark [2003] also noted that the acceptance, if not sympathy, for income inequality is greatest among those whose incomes were the most diverse in the past three years, and those who are experiencing the fastest growth of income. Oshio and Kobayashi [2011] scrutinized the relationship between income inequality and happiness in Japan. They concluded that people living in areas with large inequalities are, on average, relatively less happy. However, this relationship turns out to be only moderately important, and it is much stronger for those less fortunate and those whose employment status is unstable [Oshio, Kobayashi 2011].

Study

The source of the data used in the study is an integrated database of Social Diagnosis 2011 [Rada Monitoringu Społecznego 2011] and the report of the Social Diagnosis 2011 [Czapiński, Panek 2011].

Dependent variables:

- The average life satisfaction in the subregion; the answer to the question: “How do you feel about your life as a whole, could you say it was...”. Likert’s scale ranges from 1 to 7, where 1 means “delighted” and 7 - “terrible”.
- The average level of happiness in the subregion, the answer to the question: “Taken all together, how would you say things are these days? Would you say that you are....”. Likert’s scale ranges from 1 to 4, where 1 is “very happy” and four “unhappy”.

The average level of life satisfaction and happiness was controlled for: age, labour market status, gender and level of education.

Dimensions of quality of life [Czapiński, Panek 2011, 356]:

- *social capital* - the activity for the local community, participation in the local elections in 2010 (in 2009 the share of the general elections in 2007, in 2007 the share of the local elections in 2005, the share of the EU referendum) voluntary participation in the community meetings, a positive attitude to democracy, membership in the organizations and fulfilling functions in them, the belief that most people can be trusted;
- *psychological well-being* - a sense of happiness, the evaluation of all existing life, depression, the assessment of the past year;
- *physical well-being* - the intensity of somatic symptoms, serious illness in the past year, the degree of disability, severity of stress-related health;
- *social well-being* - no feelings of loneliness, the feeling of being loved and respected, the number of friends;
- *life stress* - the sum of six categories measured stress experiences in the following areas: finance, labor, contacts with the authorities, raising children, relationships in marriage, ecology (flat, neighborhood).

Independent variables

The main independent variable is income inequality. In the study I have used two measures of income inequality at the level of the subregion: the Gini coefficient and the coefficient of variation (90/10) compared to income of extreme income groups: 10% of the highest and lowest paid. Average monthly household income per equivalent unit obtained in the last three months prior to the survey was used to calculate the income inequality. The use of equivalence scales make it possible to measure the impact of the size and demographic characteristics on the household’s level of needs [Panek 2011, 45]. The scale of equivalence was calculated for every household and it indicates how much we need to decrease or increase household’s income, to make it possible to meet the needs on the same level as the household standard benchmark [Panek 2011, 45].

Statistical analysis was performed at the level of 58 subregions (NUTS3). The NUTS level 3 are subregions, in which the size of population ranges between 150,000 and 800,000 (except for Warsaw subregion).

Income inequalities in Polish subregions

Transition period in Poland was accompanied by rising income inequalities among Polish households. Analyzing the data on Gini coefficient provided by the World Bank [World Bank 2013] we find that after 1989: (1) the level of inequality in Poland in 1989 was relatively high (Gini = 0.269), (2) inequality increased between 1992 - 2004 (Gini coefficient in 2004 was 0.359), (3) starting from 2005 the Gini coefficient for the Polish has been decreasing (in 2011 Gini = 0.327). According the Social Diagnosis data also the income inequality measured by the coefficient of variation has been decreasing [Panek 2011].

The level of income inequality in 58 Polish subregions are shown in Table 1

Table 1 Income inequality at the household level in Polish subregions and happiness, life satisfaction and selected measures of quality of life.

Subregion	Social well-being*	Pathologies *	Social capital*	Physical well-being*	Psychological well-being*	Life stress*	Average happiness**	Average life satisfaction**	Gini **	Decile variation 90/10**
Bialski	-0,12	0,03	-0,04	0,07	-0,14	-0,1	2,13	2,89	0,36	4,59
Białostocki	0,12	-0,02	-0,07	-0,06	-0,11	-0,09	2,17	2,92	0,26	4,08
Bielski	-0,06	0,05	-0,02	0,17	0,03	0,13	2,16	2,85	0,20	2,60
bydgosko-toruński	0,09	-0,14	0,03	0,01	0,21	-0,04	2,00	2,55	0,32	3,58
Bytomski	0,06	0,12	-0,21	0,28	0,1	0,43	2,03	2,79	0,30	4,21
chełmsko-zamojski	0,1	0,1	0,07	-0,14	-0,09	0,13	2,17	2,88	0,31	3,56
ciechanowsko-płocki	0,01	-0,06	-0,05	-0,08	-0,16	-0,14	2,17	2,96	0,34	4,34
Częstochowski	0,05	0,06	0,06	0,04	0,04	0,06	2,12	2,81	0,27	3,07
Elbląski	-0,04	0,08	-0,09	0,17	0,19	0,33	2,08	2,70	0,27	3,75
Elcki	-0,06	-0,02	0,07	0,07	-0,13	0,09	2,16	2,83	0,25	3,61
Gdański	0,06	-0,07	0,08	0	0,09	-0,22	2,08	2,71	0,32	4,21
Gliwicki	0,01	-0,04	-0,05	-0,14	-0,08	-0,23	2,14	2,82	0,34	3,08
Gorzowski	-0,13	-0,01	-0,01	-0,22	0,04	-0,09	2,02	2,80	0,29	3,54
Grudziądzki	-0,02	0	-0,07	-0,12	-0,16	0,06	2,12	2,89	0,30	3,97
Jeleniogórski	0,15	0,05	0,09	-0,04	-0,03	0,13	2,13	2,77	0,34	3,73
Kaliski	0,1	-0,08	-0,02	0,05	0,19	-0,09	2,03	2,74	0,25	3,70
Katowicki	0,07	-0,19	-0,02	-0,09	-0,01	-0,01	2,06	2,87	0,46	3,99

Kielecki	-0,15	0,04	0,02	-0,04	0	0,01	2,09	2,71	0,27	3,50
Koniński	-0,1	-0,01	-0,14	-0,01	-0,02	0,11	2,11	2,83	0,29	4,16
Koszaliński	-0,16	0,09	-0,07	0,03	-0,15	-0,02	2,20	2,93	0,31	4,53
Krakowski	0,03	0,05	0,04	0,04	0,08	0,02	2,12	2,78	0,29	3,82
Krośnieński	0,05	0,05	0,06	-0,12	0,07	0,1	2,15	2,71	0,29	3,71
legnicko- głogowski	0,11	0,03	-0,03	0,01	0,17	-0,05	2,10	2,76	0,27	3,56
Leszczyński	-0,01	-0,05	0,04	-0,16	0,11	0,12	2,03	2,70	0,28	3,68
Lubelski	0,01	-0,03	0,1	0	-0,05	-0,31	2,14	2,79	0,40	4,05
Łomżyński	-0,03	0,05	-0,14	-0,01	-0,13	-0,03	2,17	2,93	0,34	4,42
Łódzki	-0,02	0,11	-0,15	0,11	0,07	0,11	2,10	2,83	0,33	3,76
Nowosądecki	0,2	0,21	-0,1	0,1	0,13	0,27	2,05	2,65	0,32	3,54
Nyski	0	0,06	-0,16	0,09	-0,05	0,1	2,14	2,79	0,31	4,39
Olsztyński	-0,26	0	-0,07	0,11	-0,16	-0,07	2,20	2,99	0,27	3,69
Opolski	0,01	-0,09	0,06	0,04	-0,07	0,1	2,15	2,95	0,28	3,44
ostrołęcko- siedlecki	-0,01	0,07	-0,06	0,1	-0,08	0,19	2,14	2,85	0,30	3,87
Oświęcimski	-0,01	-0,01	0,04	-0,32	-0,11	-0,06	2,16	2,79	0,25	3,52
Piński	-0,17	-0,09	0,14	-0,04	-0,14	0,32	2,13	2,92	0,26	3,28
Piotrkowski	-0,04	0,03	0,04	-0,16	-0,19	-0,25	2,17	2,92	0,25	3,27
Poznański	-0,01	-0,13	0,03	0,07	0,16	-0,05	2,05	2,62	0,32	3,84
Przemyski	0,01	0,21	-0,15	0,07	0,09	0,09	2,10	2,87	0,35	3,79
Puławski	0,17	0,05	0,14	-0,03	-0,01	0,07	2,07	2,89	0,31	3,58
Radomski	-0,05	-0,04	-0,01	-0,19	-0,21	-0,13	2,20	2,92	0,28	3,88
Rybnicki	0,15	-0,03	0	-0,01	0,08	0,05	2,09	2,74	0,29	3,33
Rzeszowski	0,22	0,01	0,2	0,06	-0,08	-0,15	2,18	2,91	0,30	4,42
sandomiersko- jędrzejowski	-0,13	0	0,06	-0,05	-0,25	-0,09	2,20	2,95	0,26	3,16
Sieradzki	-0,05	0,17	0,03	-0,19	-0,22	-0,01	2,11	2,93	0,37	3,59
Skierniewicki	0,06	0,15	-0,16	0,02	0,03	0,04	2,13	2,76	0,26	3,54
Słupski	0,11	0,11	0,01	0,1	0,17	0,41	2,01	2,64	0,34	4,11
Sosnowiecki	-0,07	0	-0,16	-0,04	-0,03	-0,11	2,14	2,80	0,27	3,41
Stargardzki	-0,03	-0,1	0,1	0	0,09	-0,15	2,06	2,57	0,31	4,76
Starogardzki	-0,02	-0,08	0,02	0,02	0,12	-0,03	2,06	2,84	0,30	3,51
Suwalski	-0,05	-0,01	0,06	-0,04	-0,27	0,14	2,24	2,93	0,32	3,81
Szczeciński	-0,05	-0,18	-0,02	0,08	0,08	-0,12	2,11	2,76	0,28	3,43
Tarnobrzeski	0,07	0,01	-0,05	-0,01	-0,11	-0,03	2,16	2,94	0,28	3,85

Tarnowski	0,09	0,04	-0,01	0,03	0,09	0	2,10	2,73	0,36	3,99
Tyski	-0,08	0,01	-0,12	0,17	0,16	0,1	2,05	2,62	0,41	4,86
Wałbrzyski	-0,17	-0,06	-0,06	-0,15	-0,27	-0,15	2,22	2,95	0,27	3,34
Warszawski	0,01	-0,06	0,19	0,09	0,05	-0,05	2,12	2,79	0,35	5,07
Włocławski	-0,1	0,2	-0,25	0,06	0,01	0,16	2,11	2,83	0,26	3,98
Wrocławski	-0,04	-0,07	0,05	-0,08	0,01	-0,17	2,10	2,81	0,31	4,32
Zielonogórski	0,01	-0,12	-0,06	-0,2	-0,05	-0,1	2,16	2,77	0,31	4,17

* Source of data: the report "Social Diagnosis 2011"; ** calculations based on the database Social Diagnosis 2011, when calculating the average level of happiness and satisfaction with life; covariant were: age, education, gender, labor market status, marital status.

The greatest income inequality measured by the Gini coefficient was observed in the subregion of Katowice (Polish: katowicki) and the lowest in the subregion of Bielsko-Biała (Polish: bielski). When the inequality was measured with the coefficient of decile variation (90/10) the greatest inequalities were observed in the Warsaw subregion (Polish: warszawski) and the smallest again in Bielsko-Biała subregion.

The average well-being were controlled for: age, sex, level of education, labour market status and marital status, and it turned out to be the happiest people live in Bydgoszcz-Toruń subregion (Polish: bydgosko-toruński), and the least happy residents are those of the subregion of Suwałki (Polish: suwalski). Residents of the Bydgoszcz-Toruń subregion turned out to be on average most satisfied with their life. At the opposite extreme were people of the subregion of Olsztyn (Polish: olsztyński).

Inequalities and welfare

A review of previous studies showed that there are reasons to expect a relationship between the level of income inequality and the well-being of people living in the subregion. However, Spearman correlation test results point to the lack of that relationship. The level of subjective well-being (a measure of: happiness, life satisfaction) was found to be weakly correlated with the size of inequality (Gini; 90/10), but these correlations were found to be statistically significant. Additionally a sign of the correlation was opposite than expected: increasing inequality increased mean happiness and satisfaction with life in the subregions. Spearman correlation values between average happiness and satisfaction with life, and the Gini coefficient were as follows: -, 247 ($\alpha = 0.062$), and -, 127 ($\alpha = 0.343$) and the ratio 90/10 were as follows: -, 054 ($\alpha = 0.687$) and -, 071 ($\alpha = 0.596$). Similarly, no statistically significant correlation was observed between all dimensions of quality of life and the inequality of income in subregions. Interesting results appeared while calculating the correlation between the median/average income in the subregion and the average happiness / satisfaction with life for its residents. The higher the income (mean, median), the happier the respondents (correlation scores happiness/average income -, 334 $\alpha < 0.05$;

happiness/ median income -, 29 $\alpha < 0.05$, satisfaction with life / average income -, 378 $\alpha < 0.01$, satisfaction with life / median income - 396 $\alpha < .01$).

Discussion and concluding remarks

The results of the study show no association between happiness, life satisfaction, and selected measures of quality of life and inequality of income at the level of Polish subregions. At the same time we observe that the level of subjective well-being is positively correlated with the average/median income. Does this mean that income inequality does not have a negative impact on the welfare of the Poles? Not necessarily. There are several potential explanations for that.

First, in the case of studies cited earlier ie. Luttmer [2005], a decrease in subjective well-being was followed by an experience of a decrease in income (while the level of income in neighbourhood was constant), or if the absolute income remained unchanged, while others (neighbours become relatively richer). Thus, in absolute terms the situation of the respondents deteriorated or at best remained unchanged. The situation in Poland in 2011 was different, the average real income had been growing for more than a decade and at the same time income inequality decreased [Panek 2011]. Thus, on average, we observe a situation where both the relative and absolute position of many people has been improving. It can be assumed that the negative effect of comparisons with other people, at least partially, has been offset by positive impact comparisons over time (temporal comparison). Such an assumption is in line with what is written by other authors [eg Alesina et al. 2004]: income inequality plays an important role for individual happiness if it poses a threat to the future situation. This leads to the recommendation to use panel data in future studies.

Second, the relatively low level of income inequality observed for the subregion. Based on previous studies [eg, Kurowska 2011; Wilkinson, Pickett, 2011], we can say that the Gini coefficient for both the countries and the regions is typically in the range of 0,2-0,6. If you believe that the value of 0.3 or less indicates a low level of inequality, it turns out that more than half of the Polish subregions (32 out of 58) experience low levels of inequality, and most of the rest (24) at most moderate level (less than 0.4) , and in only two subregions, Tychy and Katowice Gini coefficient exceeds 0.4.

Thirdly, it is clear from the literature review and data presented in recent years, that income inequality in Poland has been, at least for some time, decreasing. It is therefore possible that in the year 2011, the year of the data used in this study, we observe the positive effects of the change.

Fourth, if comparisons are to explain the effects of social inequality on the happiness of an individual, it is possible that the data analyzed at the subregional level is too vague. The chances that the level of inequality will be reflected in the level of happiness increase if the analysis will be conducted at the level of village, settlement or neighbourhood.

Summing up: the results do not give a definitive answer to the question: whether in Poland there is a relationship between inequality of income and happiness/satisfaction with life. Further research is needed, preferably using panel data collected for relatively smaller areas than the subregions.

References

- Alesina, A., Di Tella, R. and MacCulloch, R. (2004). *Inequality and happiness: are Europeans and Americans different?* "Journal of Public Economics", 88, pp. 2009-2042.
- Carter, G. L. (1991). *Teaching the Idea of Contextual Effects*. "Teaching Sociology", 19(4), pp. 526-531.
- Clark, A. (2003, revised June 2006). *Inequality-Aversion and Income Mobility: a Direct Test*. "Delta working papers" (11).
- Czapiński, J. & Panek, T. (2011). *Diagnoza Społeczna 2011*. Warszawa: Rada Monitoringu Społecznego.
- Duesenberry, J. S. (1952). *Income, Saving and the Theory of Consumer Behavior*. Cambridge: Harvard University Press.
- Evans, M., Kelley, J. i and Kolosi, T. (1992). *Images of Class: Public Perceptions in Hungary and Australia*. "American Sociological Review", 57, pp. 461-482.
- Festinger, L. (1954). *A Theory of Social Comparison Processes*. "Human Relations", 7, 114-140.
- Frank, R. H. (2007). *Falling Behind. How Rising Inequality Harms the Middle Class*. Berkeley, Los Angeles: University of California Press.
- Gandelman, N. & Porzecanski, R. (2013). *Happiness Inequality: How Much is Reasonable?* "Social Indicators Research", 110, pp. 257-269.
- Graham, C. i Felton, A. (2006). *Inequality and happiness: Insights from Latin America*. "Journal of Economic Inequality", 4, pp. 107-122.
- Hirsch, F. (2005). *Social Limits to Growth (revised edition)*. London: Taylor & Francis e-Library.
- Hollander, J. & Howard, J. (2000, December). *Social Psychology Theories on Social Inequalities*. "Social Psychology Quarterly", 63(4), pp. 338-351.
- Kurowska, A. (2011). *Dynamika nierówności dochodowych w Polsce na tle innych krajów – najważniejsze wnioski z badań i statystyk*. Analizy IPS Uniwersytetu Warszawskiego (2).
- Luttmer, E. F. (2005, August). *Neighbors as Negatives: Relative Earnings and Well-Being*. "The Quarterly Journal of Economics", 120, pp. 963-1002.
- Marks, K. (2006). *Wage-Labour and Capital & Value, Price and Profit*. New York: International Publishers.
- Michoń, P. (2010). *Ekonomia szczęścia. Dlaczego ludzie odmawiają wpisania się w modele ekonomiczne?* Poznań: Dom Wydawniczy Harasimowicz.
- Michoń, P. (2013). *Dobra pozycjonalne jako wyraz przynależności do klasy wyższej*. W M. Bombol, *Badania polskiej klasy wyższej. Problemy, diagnozy, dylematy*. (pp. 129-140). Warszawa: SGH.

- Oshio, T. & Kobayashi, M. (2011). *Area-Level Income Inequality and Individual Happiness: Evidence from Japan*. "Journal of Happiness Studies", 12, pp. 633-649.
- Panek, T. (2011). *Wysokość i zróżnicowanie dochodów gospodarstw domowych oraz nierówności dochodowe*. in: J. Czapiński i T. Panek, *Diagnoza Społeczna 2011. Warunki i jakość życia Polaków* (pp. 45-50). Warszawa: Rada Monitoringu Społecznego.
- Rada_Monitoringu_Społecznego. (2011). *Diagnoza Społeczna 2011*, zintegrowana baza danych. Warszawa: www.diagnoza.com (downloaded: 2013.02.25).
- Rousseau, J.-J. (1956). *Rozprawa o nierówności*. in: *Trzy rozprawy o filozofii społecznej* (translated by H. Elzenberg). Warszawa: PWN.
- Schneider, S. M. (2012). *Income Inequality and its Consequences for Life Satisfaction: What Role do Social Cognitions Play?* "Social Indicators Research", 106, pp. 419-438.
- Smith, A. (1759, 1982). *The Theory of Moral Sentiments*. Indianapolis: Liberty Fund.
- Veblen, T. (2008). *Teoria klasy próżniaczej*. (translated by J. Frentzel-Zagórska) Warszawa: Wydawnictwo Muza.
- Verme, P. (2011, February). *Life Satisfaction and Income Inequality*. World Bank, Policy Research Working Paper,(5574).
- Wilkinson, R. & Pickett, K. (2011). *Duch równości*. Warszawa: Czarna Owca.
- World_Bank. (2013, June 9). World Bank databank - Gini index. downloadable: <http://data.worldbank.org/indicator/SI.POV.GINI>

Streszczenie

W ekonomii neoklasycznej zakłada się, że użyteczność jednostki zależy od poziomu jej (ewentualnie jej rodziny) dochodu absolutnego. *Homo economicus* nie porównuje swojego dochodu z dochodem innych. Jednakże w ostatnim czasie opublikowano wiele badań sugerujących istnienie negatywnego wpływu nierówności dochodowych na poziom subiektywnego dobrostanu. Wykorzystując dane z Diagnozy Społecznej 2011, w tym artykule stawiam sobie za cel pomiar wpływu nierówności dochodowych w polskich subregionach na subiektywny dobrostan ich mieszkańców. Wyniki badania nie przemawiają ani za odrzuceniem ani za przyjęciem hipotezy o negatywnym wpływie nierówności dochodowych w subregionach na poziom subiektywnego dobrostanu.

Słowa kluczowe: dochód, nierówności dochodowe, porównania społeczne, szczęście, subiektywny dobrostan, satysfakcja z życia, jakość życia, Polska, subregion

Maria Theiss

*Institute of Social Policy
University of Warsaw*

Unravelling universal social citizenship: the role of local social policy¹

Summary

The paper is aimed at outlining the concept of local social citizenship within the theory of social policy. The paradox of social citizenship concept is that it may serve to both identify and disguise inequalities in access to welfare state benefits and services. Thus, those aspects of local social citizenship construct thanks to which it may serve the former objective are discussed in the paper. In the first section of the paper, the importance of entitlements in the concept of local social citizenship is considered, proving that viewing them from formal and legal angles exclusively is too restrictive in regard to social policy. The second section contains considerations on differences between understanding them in the liberal manner and the one proposed within local social citizenship. In the last section, hypotheses concerning the more significant transformations of local social citizenship in Poland are outlined. It is argued that entitlements at the local level are becoming stronger related to certain obligations of the citizens.

Key words: local social policy, social citizenship, local community, local citizenship

¹ This paper has been prepared within a research project “Local social citizenship in social policy: the example of care services for children under 5”, funded within the National Centre of Science (NCN) SONATA grant, contract no.: 2011/03/D/HS5/02498.

Introduction

In the contemporary research on local social policy, the perspective focused on institutional efficiency is particularly often employed. The *governance* approach which focuses on identifying coordination mechanisms, as well as a large portion of research on local activity and participation, aims to identify the factors which result in a larger number of services and a higher quality of local social policy. These approaches fall within the Putnam's perspective in its broad sense (Putnam 1995). They assume that a civic and cooperating local community contributes to the formation of a responsive, efficient and innovative local government which will be effective in implementing highly valued local social policy. Neither questioning the topicality nor relevance of the mentioned streams of literature, in this paper an alternative view on local social policy is proposed. The discussed here perspective of social citizenship, including the concept concentrated on its local dimension differs from the technical approaches oriented towards efficiency.

While there are various definitions of social citizenship, as is noted by its researchers – an attempt to accurately and precisely define it seems pointless since its essence lies in that it is a subject for definition disputes, including the political ones. From the Marshallian perspective “*social citizenship is a status bestowed on those who are full members of the community. All who possess the status are equal with respect to the rights and duties with which the status is endowed*” (Marshall 1950, p. 87, Turner 2009, p. 66, Heywood 2008, p. 125). Thus, social citizenship is an empirical object – it is an institution; however, in the study of social policy, it is primarily a theoretical and research perspective. Using it means research on social policy (including local social policy) directed at identifying various aspects of individuals' exercising their rights. It constitutes a broad strand of literature, even as some argue, an unlimited one, since every question in political philosophy may be expressed in the categories of rights and duties (Kymlicka & Norman 1994, p. 353). Within this strand, there are specific approaches already functioning (for example, Nancy Fraser's perspective of redistribution and recognition, or Amartya Sen's *capabilities / opportunities* approach), various ‘types’ of citizenship are identified (for example multicultural, cultural, post-national, and many other) and several research areas are particularly investigated (issues of migration, cultural policy, citizen education, etc.). The dynamics of this perspective seem to prove that it is still relevant in regard to investigating the current transformations in social policy.

This paper is aimed at outlining the concept of local social citizenship within the theory of social policy. This notion, as well as the notion of local dimension of social citizenship or the related ones, has occurred in the citizenship literature (eg. Sassen 2002, Yuval-Davis 1997, Marinetto 2003). However, they are viewed in quite a varied and imprecise manner. They are often used to describe local policies and practices of immigrant integration in large cities. The aim of the paper is to propose another ‘theoretical localisation’ of local social citizenship. It will be shown that local social

citizenship may serve as a category to investigate inequalities and differences in access to social transfers, and most of all – to social services provided by the welfare state. However, the paradox of the citizenship concept is that – as has been shown primarily by feminist criticism – it may serve to both identify and disguise social inequalities. Thus, those aspects of local social citizenship construct thanks to which it may serve the former objective are highlighted in the paper. In the first section of the paper, the importance of entitlements in the concept of local social citizenship is considered, proving that viewing them from formal and legal angles exclusively is too restrictive in regard to social policy. The second section contains considerations on differences between understanding them in the liberal manner and the one proposed within local social citizenship. In the last section, hypotheses concerning the more significant transformations of local social citizenship in Poland are outlined.

Entitlements as the Foundation of Social Citizenship

In various streams of theorising on citizenship, the notion of ‘the status of the individual, manifested in the entitlements’, which is key to the concept of citizenship, implies different sets of specific meanings. Their extensive reconstruction in this paper is neither the author’s intention, nor it is possible; however, three conventions of viewing them are worth consideration. Firstly, in the legal approach, this status is a primarily formal relation binding the individual with the state (Raciborski 2011, p. 57, Bodnar 2008, p. 4). The research within this very citizenship perspective often takes form of comparative studies and focuses mainly on the regulations on acquiring the citizenship of a country and on the legal consequences of possessing one. In this area, for the last dozen or so years, the questions considered have included, among others, the relations between the citizen’s rights and human rights, the rights of migrating people, national and ethnic minorities, or changes resulting from the increasing role of supra-national structures (in this context, for example, the notion of the multi-level citizenship in the European Union is concerned; Bodnar 2008, Duszczyk & Stawicka 2003).

Secondly, in the political philosophy approach, the analysis of the individual’s status, expressed in the language of entitlements, poses primarily the questions about obligations and citizen virtues connected with executing political rights (such as freedom of association, voting rights and rights to other types of political participation, etc.). This approach focuses on the active and not the passive aspect of citizenship (Turner 2009), which means a concern about citizen participation and not the guarantees of social security. The classic controversy refers here to the meaning of political rights – whether they are to be perceived as manifestations of an individual’s freedom (liberal tradition of citizenship), citizen duties and virtues (republican tradition), or connections with the community, including the local one, and with social solidarity (communitarian tradition). In recent years, in this stream of literature, the considerations on balancing the citizens’ rights and duties have been particularly

frequent, and the researchers typically concluded that what is observed is the erosion of citizenship in the classic sense, as it is ousted by ‘the citizenship of social rights’. The measures aimed at reversing this trend include the political discourse which postulates *active citizenship* which is achieved thanks to the welfare state institutions urging the citizens not only to be active on the labour market (active welfare state), but also to get involved in the political decision making process for the benefit of the local community (Brannan et al. 2006, Marinetto 2003).

The third area of considerations, referred to as ‘sociology of citizenship’ (Turner 2009, p. 66) focuses on the role of the factors which promote the actual execution of the citizens’ formal entitlements. In particular, it is stressed here that regardless of the formal equality, factors such as class affiliation or social and economic status, gender or cultural and ethnic background may determine the line of division of citizens into first-class and second-class. Furthermore, the feminist criticism argues that the universal, formal status of the citizen is a facade for disguising social inequalities (Kwiatkowska 2010, Yuval-Davis 1997); however, numerous constructive propositions of solving this issue have also been articulated (diversified citizenship, multi-cultural citizenship, etc.).

As a research perspective, *social* citizenship assumes an analysis of both the mentioned formal, informal and normative aspects of female and male citizens’ status; however, it concentrates on the sub-set of rights. Whereas the approaches of political science, especially the legal ones, consider the issues of the status as resulting from *civil* and *political* rights, when *social* citizenship is concerned, the focus of attention is moved onto the area which Thomas Marshall labelled the “social element of citizenship”. What was meant by the notion then (that is in 1950) was “*the whole range from the right to a modicum of welfare and security to the right to share to the full in the social heritage and to live the life of a civilized being according to the standards prevailing in the society*” (ibid., p. 74), thus, they are the broadly viewed social rights.

In this proposed notion of local social citizenship, using social citizenship as a research category in local social policy entails a further restriction of the scope of the researched entitlements. The analysis of local social citizenship covers the entitlements which are granted and exercised at the level of the local political community (in the case of Poland – the smallest administrative unit: *gmina*). Thus, its scope does not include the entitlements whose execution is determined by supra-local entities and only deconcentrated in provision. This pertains to, among other things, the social insurance benefits, health services financed by the Polish National Health Fund, obligatory social assistance or family benefits. Therefore, the study of local social citizenship shall focus on the inhabitants’ rights which are autonomically executed (as the *gmina*’s own tasks) at the level of the local community; namely, those in the case of which it is the local community (local authority) that decides how certain services are to be provided or even, in case of some services, who is a person entitled to them. In Poland, in practice, it covers, among other things: education at the level of kindergarten and elementary school, some social assistance benefits, local programs of public

health care and family support, housing and culture. What determines the specificity of the local social citizenship category is, among other things, the focus on those social entitlements which are manifested in form of social services provided by *gminas*. As shall be discussed in detail further on, this fact brings significant theoretical and methodological consequences resulting from, among other things, the fundamental role of local practices, including the informal ones, in executing citizen entitlements. This aspect has been overlooked in research on social citizenship at the central level, sometimes operationalised as the right to certain social transfers (it was the case of, for example, the *Social Citizenship Indicators Programme*; (Korpi 2010, Kvist 2008).

Although there is a legal category in the centre of the social citizenship concept, it has to be stressed that if ‘the execution of entitlements’, including especially the local community level, as referred to, this notion has a broader meaning than is usually assumed in legal sciences. Also, while in this discipline, the expression “X is entitled to A” may mean various situations, what is meant by it in the legal approaches to citizenship is the subjective right which enables X to lay claims to A. However, in the case of many welfare services and benefits, the inhabitants of Poland fail to have rights understood in this way. As has been argued by constitutional experts, part of social rights included in the Constitution is a description of the state’s policy rules, or, basically, the formulation of the legislator’s intentions and not the source of subjective rights (Garlicki 2009, p.93)². Therefore, the range of subjective rights on the basis of the specific acts of law is narrower than in the view of the concept of social citizenship. For example, it cannot be argued that “the citizen has the right to have her child’s admission to a kindergarten ensured” (except for compulsory kindergarten for 5(6)-year-olds) or “the citizen’s right to use the public library”.

However, what may be considered in this context is the broadly viewed entitlements, in legal sciences referred to as “the reflexes of the subjective right” which mean “*providing citizens with benefits by the state through the authority’s general commitment to execute acts of law (...) which in a specific context are advantageous for the individual (...) [however] they do not only fail to allow individuals to lay individualised claims, but even fail to ensure that the authorised body shall adjudicate*” (Jakimowicz 2002, p.125, cf. also Garlicki 2009, p. 98). R. Piszko explains what the connection between the expression “X is entitled to” and the legal reflex is, by stating that the ‘one’s entitlement’ expression is also used to identify “a situation which is generally advantageous for an entity, and which is a reflex of imposing some duties on other entities by a norm” (Piszko 2006, p. 16), and such a meaning, as has been mentioned, may be assigned to the entitlements contained in the concept of social citizenship.

² This also refers to kindergarten education. In the Judgement of the Constitutional Tribunal of 18 Dec. 2008, it was stated that in the Constitution “there is no regulation which would explicitly ensure or even imply among the objectives of public authorities activities the managing of kindergartens, nor all the more any subjective right to pre-school education (...), kindergartens are not institutions which would participate in exercising the constitutional right to education, regulated by Art. 70” (OTK [Judgements of the CT] no 10/A/ 2008, item 182).

The second element which locates entitlements within the concept of local social citizenship, and which, as opposed to the first one, reaches beyond the legal categories, are (in this case local) practices promoting the actual access to benefits and services, pertaining to, among other things, capitals, including the cultural one, necessary to benefit from the functioning of institutions, to granting access to information, or to the manner of addressing male/female citizens by institutions.

Local Social Citizenship: A Response to the Unfair Universalism of Citizenship

Recently, the category of local citizenship, including local social citizenship, has usually appeared in the literature in the context of reflections on the decline in the importance of the role of the state as ‘the level of localising’ citizenship and, more frankly – transformations of ‘the geography of the welfare state’ (Sassen 2002, Abrahamson 2005, Shinkel 2010, Yuval-Davies 1997). Whether statehood is still an essential feature for citizenship, as was perceived by the cited classic of the field, Thomas Marshall, has been a question for disputes for a certain time. On one hand, researchers indicate that even if we consider various ‘mutations’ of citizenship, understood as new concepts and new practices typical of the times of globalisation, statehood and the state equipped with the possibilities of making and executing law are the basic point of reference for the concept. On the other hand, the advocates of the so-called thesis on citizenship disaggregation (Benhabib 2002, Raciborski 2011, p. 45) argue that elements such as: membership in political community, citizens’ rights and identities, once closely connected, are beginning to function separately, and the territory is no longer their keystone, which most of all results from the processes of globalisation. Leading researchers in this field suggest that in this context one should consider the post-national or denationalized citizenship (Soysal 1994, Sassen 2002).

Undoubtedly, the spatial aspect of citizenship has undergone significant transformations in recent decades, and it provides an important context for analysing local social citizenship. However, it is not the reflection on space that is the basic point of reference in the discussion on local social citizenship in social policy science. Instead, it is contributing to the deconstruction of the classic liberal, and thus up to a point, Marshall’s model of formal and state citizenship. It was stressed by Thomas Marshall that citizenship is a form of equality in the world characterised by inequalities – independent of, for example, income, the votes of citizens counted in the same way and their entitlement to identical services in the public health care system. However, one reservation needs to be made here: Marshall was aware of the fact that for actual possibilities to use civil or political rights, social rights are necessary (Marshall 1950, cf. Zamorska 2010, p. 95) – it is only for the person who has, for example, access to free learning in how to read and write that the possibility to participate in the political process is not purely illusory. Marshall’s model of citizenship failed to equate the formal status with the real chances to use one’s entitlements, and in this sense, was

not liberal in the extreme. However, the majority of criticism, directed at Marshall's concept, among others, by feminists, pertained to that it was only the social class that was the dimension of inequalities where some 'tensions' with citizenship appeared. It disregarded categories such as gender, age or ethnicity.

Therefore, the deconstructing nature of local social citizenship is important not as an element of abstract theoretical dispute, but due to the fact that in social policy, the concept of citizenship may serve two basically different objectives – either the building of the illusion of equality or some spheres of equality (and thus discrediting the issues of, for example, exclusion), or the better identification of social inequalities as well as mechanisms which cause them. While the legal and formal approaches, the so-called liberal ones, entail such a risk of narrowing the perspective, the concept of local social citizenship may serve the latter, cognitive and emancipational objectives. Thus, the “deconstructing power” of local social citizenship is based on its three aspects – arguments against equating citizenship with formal status identical for all citizens of a country. The triad consists of: differences in local resources, local communities' subjectivity and local practices in favouring access to benefits and services.

Demonstrating the role of differences in local resources is consistent with feminist criticism of the universalistic (liberal) model of citizenship. As mentioned, the criticism by feminist researchers consists of, in short, proving that the claim on citizens' equality based on equal rights, such as, for example, the right to vote, right to work or freedom of speech is gender blind. They argue: what point is there in women having the right to be elected as a council member, especially in traditional social systems, since it is the men who are offered the first places in electoral lists; what point is there in having the right to work if the necessity to look after the dependent members of the family is more urgent; what is the point of freedom of speech if their voice is not seriously considered? As stressed by Yuval-Davis, among others, this type of perception is, first of all, standardising the pattern of the citizen according to the male example, and secondly – sanctioning exclusion under the slogans of formal equality (Yuval-Davis 1997).

An analogous argumentation may refer to diversifying the real possibilities of citizens' access to benefits and services with regard to the place of residence³. Also, it is not the very place but the local resources that make citizen entitlements in various local environments have a formal character of exclusivity. The rights to housing or to support the family in regard to caring services fail to improve the citizens' situation if there is no community/social housing available in a *gmina*, or if there are no funds to employ, for example, community support workers. This question arises not

³ Obviously, a full analogy is not possible here. Gender, similarly to ethnicity or religion, is a more stable feature of the individual than their place of residence. Moreover, even the very enterprising citizen-oriented local communities do not form large social movements which would formulate group postulates of recognition or redistribution, as it is the case of the gender or ethnic movements. Another difference pertains to that the gender is more strongly constitutive for a person's status and identity than the relatively easily changed place of residence.

only in the works by feminists. As Greer and Matzke point out, in reference to the British context: “*if money, resources and laws are what makes social citizenship rights real, and devolution shapes the allocation and use of money, resources and laws, then devolution will change the nature of citizenship rights (...) the material content of social citizenship and some of the rhetoric (...) are now shaped by the politics on levels other than UK*” (Greer, Matzke 2009: 3).

The concept of local social citizenship deconstructs Marshall’s model also as to its second, ‘positive’ meaning. The concept is based on the subjectivity of local communities and the possibility of adjusting local services and provisions to the inhabitants’ priorities and needs. Both the social objectives of the *gmina*’s activities, and the way of providing services, which are the *gmina*’s own tasks, may allow for specific problems, traditions and cultural specificity of the local community. Interestingly, while citizenship theorists frequently argue that granting entitlements to various cultural groups, immigrants and national minorities is a way of ‘casting off the yoke’ of universalism (Young 1989, Kymlicka & Norman 1994), in regard to social citizenship, the issue of decentralisation and the actual passing of the ability of self-determination onto local communities by the state is a rather ignored one. However, there are examples of Polish *gminas* where programs which do not exist at the central level are accepted, for example the program of co-financing in-vitro fertilisation (Częstochowa) or the complex policy of supporting multi-children families (Wołomin), and they prove that it is possible to grant specific entitlements to members of local communities thanks to the right of self-government.

The third element of local social citizenship which ‘disassembles’ Marshall’s model are local, including informal practices guaranteeing certain groups of inhabitants priority of access to services (and thus, also – excluding others from accessing them). For example, in spite of the central directives in this matter, local regulations and customs connected with recruitment to kindergartens may favour inhabitants in regard to their place of residence closer to this institution, their affluence, parent’s occupations, number of children, but also social or cultural capital, etc. This element has been purposively included in the triad by the author. In the theory of citizenship, there are argumentations that granting group entitlements within the institution of citizenship (for example, to groups which differ from the majority in their ethnicity, religion, sexual orientation) is not a solution to the problem of real inequalities in exercising rights by the members of the empowered group (Yegen 2008). Therefore, for example, the right to education in a different language than the national language fails to eliminate the issue that children from certain minority families have a more restricted access to education than other. Highlighting self-determination of *gminas* in a considerable area of social policy ought to be accompanied by a reservation that this means neither the fact that self-governing communities are constituted by similar, integrated inhabitants, nor that they can always accurately identify their inner social diversifications and are prepared to address them in their social policy measures.

Local social citizenship may be therefore perceived as an area of relations between the elements of the outlined triad. In these dimensions, it is also the area shaped by the policy of the central level. This is visible even in the recent obligation imposed on *gminas* to provide all 5-year-old children with a place in institutions of kindergarten education, which had been preceded by reducing the taxation income of local governments. In many *gminas*, the result was the ‘pushing out’ of the younger children from the kindergarten system. In the outlined proposition, as the author has attempted to show, local social citizenship is most of all a concept of non-liberal perception of entitlements in social policy. It is to provide a context for the formulation of research questions primarily about two dimensions of citizen diversification – differences in access to local provisions and services among the inhabitants of various *gminas* and within *gminas*. However, it needs to be stressed here that it has not been assumed that it would be either achievable or fair that entitlements and possibilities of using them be identical for all. Instead, what is proposed is the ‘project’ of an in-depth research on the mechanisms of social stratification caused by formal and informal activities within local social policy.

Towards a Program of Research on Local Social Citizenship in Poland – Research Questions, Hypotheses, Operationalisation

The range of issues of research on local social citizenship may be wide – it serves more as an inspiration than firm theory. Therefore, in this part of the text, only four exemplary areas, relevant from the angle of local social policy in Poland, are indicated – the potential spheres of local social citizenship transformations. The first of them shall be questions about local patterns of social services provision, and further – of social policy, selected due to the stratifying character of activities. It is the question whether it is possible, to some extent by analogy to typologies of Esping-Andersen’s regimes of welfare state and their impact on the social structure, to consider ‘local regimes’ which are, for example, relatively more egalitarising or stratifying the citizens. What does it look like in the case of all *gmina*’s activities, and in the case of particular types of services? For kindergarten education, this would mean the question whether there are *gminas* (and what their characteristics are) where there is an average percentage of children attending kindergartens and using kindergarten education is relatively equally distributed within particular social layers (as opposed to what usually happens – that there is an overrepresentation of children from families of higher social and economic status)? Most important of all, the question whether there is and what the influence of local policy on such a situation would be significant here.

The author has attempted to answer similar questions in one of the exploratory studies on the *gmina* budget expenditures. Expenditure on the *gmina*’s own tasks, compared with the budget, have been arranged according to activities addressed, based on income tests (*gmina*’s social grants, *gmina*’s one-time maternity benefit, optional provisions of social assistance, etc.) and activities based on the universalis-

tic principle (public health care programs, expenses on school equipment in primary schools, etc.). The results of the research are described in detail in another work (Theiss 2012); however, the general conclusion is not alternativeness but a strong tendency to correlate (the number of inhabitants being controlled) to the scales of expenditure, which is explicated not only by the level of *gmina's* income. This may suggest that in Poland, at least in using the quantitative measures, local social citizenship is more a function of *gmina's* authorities' interest in standard and quality of life than a manifestation of the systemic concept of whom to support and in accordance with what regulations.

The second area of questions and hypotheses pertains to political, in their broad sense, conditionings of various potential patterns of favouring particular groups of social services recipients. Are there any connections between the hypothetical egalitarian access to kindergarten services and the 'political colours' of authorities or the character of political activity and mobilisation of the inhabitants? The mentioned cases of unique entitlements for *gminas'* inhabitants (co-financing of fertility treatment in Częstochowa, governed by a left-wing party coalition) raise hypotheses on the existence of political (also in the sense of the traditional 'party politics') conditioning of decisions on local services. In the mentioned research (Theiss 2012), the relation between 'generous' local social citizenship (high expenditure per capita on different *gmina's* own tasks) and the social capital in the *gminas* (density of non-governmental organisations, turnout at elections, use of instruments of local participation) has been observed; however, it pertained to rural *gminas* exclusively. In the urban ones, the context which was relatively more advantageous for generous citizenship had resulted from a good economic situation.

Another sphere of investigation on local social policy from the perspective of social citizenship has been determined by issues of formal and informal boundaries of a local community – the range of people who have access to the benefits of services of a *gmina* and the mechanisms of exclusion from this access. A hypothesis both on migrations and alleged migrations in search of better social services, and on mechanisms of the *gmina's* authorities guaranteeing 'their'⁴ inhabitants priority, can be raised here. In the current research carried by the author into the conditioning of local social citizenship in the *gminas* around Warsaw, there have been inhabitants' statements on giving fictitious addresses of residence by the inhabitants of neighbouring *gminas* in order to have greater chances of their child being admitted to kindergarten. Similarly, the initiatives were introduced (in some *gminas* such systems are already functioning) of a 'resident card' which will be distributed among the actual inhabitants and guarantee that "*those from the housing estate built out of the limits of the gmina, to whom the developer lied that they would live within it (...) will not apply to our kindergartens*" (council member in P, text underlined by MT).

⁴ That is, residing in the area of the *gmina*. It is significant in the light of lack of regional division in providing social services.

The issue closely linked with the subject of facilitating the access to *gmina*'s services and exclusion from it pertains to the associating of entitlements to services, or facilitations in access to services with specific obligations or responsibilities of citizens at the local level. It has been observed that recently in Poland, especially in the suburban *gminas*, the logics of associating the right to services with the responsibility or even the obligation to pay taxes at the local level has been more and more common. Apparently, the problem pertains to those inhabitants who migrate, among other things, to places where it is easier to find a job or where house prices are lower, and who still pay taxes in their 'old' places of permanent residence, which they do not wish to officially give up. In the local discourses, there are voices of unlawful (although fully legal!) right to kindergarten admission in the case of such families, as it is not based on the contribution of the interested party in the form of paying taxes. The reaction to that, for example in Warsaw, has been accepted that parents who apply for a place in a kindergarten receive additional points for documenting paying taxes locally. In other *gminas* (Lesznowola near Warsaw), there have been different charges for classes at the local culture centre, depending on the ability to present the proper certificate from the tax office. Another *gmina* near Warsaw (Wolomin) is holding a lottery in which the participants who have submitted their tax office location update forms may win a luxurious car. During one of the sittings of the town council, the mayor of this town stressed that this competition is aimed at those new inhabitants who want to manifest "*their local patriotism*".

One of the main criteria of methodological correctness of investigating into local social citizenship in the outlined approach is the application of such techniques which enable one to identify, in the first place, in the case of which *gminas* access to services is evenly distributed among various categories of citizens. Secondly, for which categories of citizens the formal entitlements remain only formal, and in the case of whom they allow the actual access to services. Thus, a useful quantitative approach would be to use multilevel data – on individual inhabitants by *gminas*. Databases prepared in this way are rather rare, though. Nevertheless, the outlined concept of research provides primarily arguments for multi-technique research, including analysis of acts of law, analysis of quantitative and qualitative data on rules of using services, and, as it is more and more often highlighted – analysis of public discourse. It still remains a methodological challenge to develop such approaches that would allow aggregation of knowledge on local social citizenship, and which would assumedly crystallise in relation to particular types of locally provided social services. The pioneer works in this field pertain to services in the domains of kindergarten education or activation of the unemployed.

Concluding Remarks

The presented concept of local social citizenship is an attempt to perceive local social policy as a system of social stratification. However, the potentially stratifying role of social policy is viewed here in its broad sense, in such a way that allows cov-

ering many, and new, dimensions of social diversification. The specificity of such an approach also relies upon the assumption that there is political, in its broad sense, conditioning of local social citizenship. Decisions on allocating funds of the *gmina's* budget that result for the inhabitants in, for example, better access to certain services are (often ad hoc and random, though) political decisions. Thus, this is a rather different perspective than in some approaches in the national social geography, in which the differences in using social services are explained mainly as strict institutional patterns. Obviously, institutions inherent to local social citizenship may be *longue duree* structures; however, the construction of the concept may foster the explanation of a change more than the mentioned approaches.

According to the classical notion of citizenship a relation linking the citizen to the state should be a stable one and also a basis of her or his identity. Traditionally this was the case of a national citizenship. Such a stability could be easily regarded as obsolete in contemporary times. Since spatial mobility of people is growing, to what extent is it worth speaking of citizenship in terms suggesting individuals' strong attachment to a certain place? It should be noted that in here proposed understanding of local social citizenship neither the ideal of traditional local community, nor the assumption of lacking territorial mobility is taken into account. Rather, the here discussed category might be regarded as a tool to investigate the processes of citizenship disaggregation.

References

- Abrahamson P. (2005), *A new significance of space and place regarding social citizenship: the case of the European Union*. Paper prepared for the ISA RC 19 Conference at North Western University, Chicago, September 8-10, 2005.
- Benhabib S. (2002), *The transformations of Citizenship: the Case of Contemporary Europe*, "Government and Opposition", vo. 37, no 4, pp. 439-465.
- Bodnar A. (2008) *Obywatelstwo wielopoziomowe. Status jednostki w europejskiej przestrzeni konstytucyjnej*. Wyd. Sejmowe, Warszawa.
- Brannan T., John P., Stoker G. (2006), *Active Citizenship and Effective Public Services and Programmes: How Can We Know what really works?* "Urban Studies", vol 43, nos 5/6, pp. 993-1008.
- Duszczyk M., Stawicka K. (2003), *Obywatelstwo europejskie. Pytania i odpowiedzi*. Wyd. Fund. im S. Batorego, Warszawa.
- Garlicki, L (2009), *Polskie prawo konstytucyjne. Zarys wykładu*. PWN, Warszawa.
- Greer S., Matzke M (2009), *Introduction: devolution and citizenship rights*. In: *Devolution and social citizenship*, S. L Greer (ed.), The Policy Press, Bristol.
- Heywood A. (2008), *Klucz do politologii*, Warszawa PWN.
- Jakimowicz, W. (2002), *Publiczne prawa podmiotowe, Zakamycze*, Warszawa.
- Korpi W. (2010), *Class and Gender inequalities in different types of welfare states: The Social Citizenship Indicator Program (SCIP)*, "International Journal of Social Welfare" no 19/2010.

- Kwiatkowska (2010), *Koncepcja obywatelstwa w teorii feministycznej*. In: *Praktyki obywatelskie Polaków*, J. Raciborski (ed.). IFiS PAN, Warszawa.
- Kvist J. (2008) *Measuring welfare states: problems and possibilities in cross-national studies*. Conference paper for: 'The Future of Social Citizenship: Politics, Institutions and Outcomes', Stockholm 2008.
- Kymlicka W., Norman W. (1994), *Return of the Citizen: A Survey of Recent Work on Citizenship Theory*. "Ethics", vol. 104, no 2, pp. 352-381.
- Marinetto M. (2003), *Who Wants to be an Active Citizen?: The Politics and Practice of Community Involvement*, "Sociology" vol 37 (1), pp. 103-120.
- Marshall T. H. (1950) *Citizenship and Social Class and other essays*. Cambridge University Press, Cambridge.
- Piszko R. (2006), *Pojęcie prawa podmiotowego*. In: *Prawa podmiotowe. Pojmowanie w naukach prawnych*. J. Ciapały, K. Flaga-Gieruszyńska (ed.), USz i WWSH-E in Jarocin, Szczecin.
- Putnam R. (1995), *Demokracja w działaniu: tradycje obywatelskie we współczesnych Włoszech*. Fund. im. S. Batorego, Warszawa.
- Raciborski, J. (2011) *Obywatelstwo w perspektywie socjologicznej*. Wyd. Naukowe PWN, Warszawa.
- Sassen S. (2002), *Towards Post-National Citizenship*. In: E. Isin, B. Turner, *Handbook of Citizenship Studies*, Sage London.
- Shinkel W. (2010), *The Virtualization of Citizenship*, "Critical Sociology" no 36 (2)/ 2010, pp 265-283.
- Soysal N. (1994), *Limits of Citizenship*, University of Chicago Press.
- Supińska J. (1991) *Dylematy polityki społecznej*. IPS UW Warszawa.
- Theiss M. (2012), *Różne światy lokalnego obywatelstwa społecznego? O zróżnicowaniach gminnej polityki społecznej w Polsce*, „Studia Polityczne” no 30, pp. 287-322
- Turner B. S. (2009) *Thinking Citizenship Series*. T.H. Marshall, *Social rights and English national identity*. "Citizenship Studies", vol. 13, pp. 65-73.
- Yegen M. (2008), *The dialectic and the tragedy of citizenship*, "European Political Science" no 7, pp. 98-112.
- Young I. M. (1989), *Polity and Group Difference: A Critique of the Ideal of Universal Citizenship*, "Ethics" no 99, no 2, pp. 250-274.
- Yuval-Davis N. (1997), *Women, Citizenship and Difference*, "Feminist Review" no 57, pp. 4-27.
- Zamorska K. (2010), *Prawa społeczne jako program przebudowy polityki społecznej*, WUWr, Wrocław.

Streszczenie

Celem artykułu jest próba zarysowania w teorii polityki społecznej autorskiej koncepcji lokalnego obywatelstwa społecznego. Paradoks koncepcji obywatelstwa społecznego polega na tym, że może ono służyć zarówno rozpoznawaniu, jak i skrywaniu

nierówności w dostępie do świadczeń i usług oferowanych przez państwo opiekuńcze. W artykule przeanalizowane są te aspekty konstrukcji lokalnego obywatelstwa społecznego, dzięki którym może ono służyć temu pierwszemu celowi. W pierwszej części tekstu omówione jest znaczenie uprawnień w koncepcji lokalnego obywatelstwa społecznego – ukazane jest, że wyłącznie formalno-prawne ich rozumienie jest w polityce społecznej zbyt zawężające. W drugiej części przedstawione są różnice między liberalnym ich rozumieniem a proponowanym w ramach lokalnego obywatelstwa społecznego. W części ostatniej zaproponowane są hipotezy dotyczące ważniejszych przemian lokalnego obywatelstwa społecznego w Polsce – m.in. wskazane jest, że do czynienia mamy z silniejszym powiązaniem uprawnień z realizacją określonych obowiązków na poziomie lokalnym.

Słowa kluczowe: lokalna polityka społeczna, obywatelstwo społeczne, społeczność lokalna, lokalne obywatelstwo

Z WARSZTATÓW BADAWCZYCH

Piotr Arak

*Institute of Social Policy
University of Warsaw*

Measuring human development on county and voivodeship level in Poland

Summary

This paper presents a summary of the methodology of computation and the use of the measure of human development in Poland. The United Nations Development Programme (UNDP) prepared a new measure for the Polish government. The Local Human Development Index was created on the basis of the existing Human Development Index and is used to measure human development at county and voivodeship level. The index is based on data available in the public statistics and administrative records. The article also examines the relationship between the territorial allocation of the cohesion policy funds, Operational Programme Human Capital and social spending and the level of human development. The effect of which is a confirmation of the hypothesis that funds under those public interventions are allocated in regions with lower levels of human development, but also a suggestion for a better strategy of cohesion funds allocation.

Key words: human development, county, human capital, social policy, measurement

Introduction

Social policy is a science, which aims to “purposefully organise social progress” (Danecki 1974) that is at the same time connected with a diagnosis of the social situation. The fulfilment of the aims and the outcome of social policy can be most effectively evaluated by the means of social indicators, namely measurements that reflect the individuals’ life conditions (Kurowska 2001). On the other hand, social policy is “a practical knowledge which investigates changes that occur in the social structure due to purposeful activity of social groups and institutions, it’s about the many and various things that affect the kinds of life that people live and means to live it” (Szumlicz 1994), where social indicators can be applied (Kurowska 2011). Material paradigm, which is based on the notion that possessing something is automatically translated into the state of being happy and human development, was the main stream of the political thinking for decades. In the early 70s alongside the formation of the social indicator movement there were voices about dethronement of GDP as the main indicator of development and as a developmental goal.

However, GDP still plays crucial role in spite of its disadvantages as not taking into consideration non-economic factors for measuring prosperity and man’s development. In the end, what was pointed out by the authors of the report for the President of France (Stiglitz, Sen, Fitoussi 2009), achieved quality of life, therefore health, education, and the leading of a valuable life among loving and respectable people are among the most important factors for everyone. Crowning achievement over the works on the different social indicators can be the approach, which was shaped by Amartya Sen and Mahbub ul Haq. They created a category of social development, which gives the rise of human’s freedom as well as the possibility of living the life people consider to be the best for them. The matter of this approach is to increase individual’s possibility of choice. Amartya Sen (1993) wrote that the human development consists of two elements: creating new “possibilities” for people – such as improving health conditions, growth of knowledge or competences, and how people use those newly acquired possibilities – within the purposes of manufacturing, entertainment, and membership in culture, in social and political spheres. “Capabilities” should be understood as various combinations of the attitudes and activities of individual, which are attainable or available for the people, and constitute what is described as “good life” from the perspective of different kinds of people. Putting emphasis on “possibilities” and not simply on achieved results underlines the freedom of choice of every person.

Human development by UNDP (United Nations Development Programme) is the process that helps to improve socio-economic conditions in a given society. It is more than economic development. Over time many prominent experts have contributed their ideas to the Human Development Reports and helped develop the HDI methodology. In 1990, for the first time UNDP has published results on the study of human development to raise the awareness of the challenges, which countries at

different stages of development were facing, and to mobilise public support for policies aimed at improving the quality of life at both the national and international levels.

UNDP in Poland alongside the Ministry of Regional Development and Warsaw School of Economics started a project aiming to create and use a new measure of human development on the local level, the methodology of which is based on the Human Development Index (Arak et al. 2012). It became part of the strategic system of monitoring developmental goals in the strategic documents of the Polish Government, for example in the National Development Strategy (Ministerstwo Rozwoju Regionalnego 2012). The indicator is also used for better planning of the regional policy, also referred to as the cohesion policy; a policy with the stated aim of improving the economic well-being of regions in Poland and also to avoid regional disparities, which is mostly funded by the European Union. This policy also has a role to play in wider challenges for the future, including climate change, energy supply and globalisation and as such should be planned using thorough evidence. In this article the relationship between the presented indicator and the certain kinds of social expenditures and cohesion policy will be analysed.

Local Human Development Index

Local Human Development Index (LHDI) in accordance with the will of the Ministry of Regional Development, may serve as the basic instrument for a better planning, allocating, supervising and control of how the funds are spent and implemented up until 2020 (Arak et al. 2012). There was also an attempt to conduct an analysis of human development dynamics. However, the timeframe had to be shortened due to limited data availability; that is why it only covers the years 2007-2010 (Arak et al. 2012). LHDI was created according to the principles of simplicity and the necessity to connect social as well as economic measures, which was postulated by Mahbub ul Haq (ul Haq 2003) during the formation of HDI in the 1990s. HDI, for years used for international comparison, slightly changed in 2010. Nevertheless basic measurements: education, health, and standard of living are still used to rank countries in their progress on improving human development.

An established definition of an indicator is not set out by the Polish literature. Instead, the concept of an indicator is used interchangeably with the concept of a measure (Borys 2005). There are some differences between these two terms in Social Policy understood as a science. The measure is a quantitative estimate, which describes and measures economic and social processes and phenomena. The indicator is an observable and calculable feature of a subject or phenomenon, the existence of which implies the existence of other phenomena for us to measure (Szarfenberg 2008). In the field of human development the measures are the partial indicators of the synthetic measure and the indicator is the Human Development Index.

The LHDI as a measure of human development at regional level may provide the central authorities reference points for their strategic goal posting in the future (Ivanov

& Pelah 2011, UNDP Poland 2006). However, a major problem exists in regard to data availability and their quality at lower territorial levels: the smaller territorial unity, the bigger problem with the appropriate quality data. Especially crucial is to receive the data concerning expenditures on health care, which theoretically can be obtained through the National Health Fund on the county level. However, it is not possible due to the fact that the Fund's headquarters have an underdeveloped IT system. The same problems concern indicators of public health, morbidity rate, and death rates, which are recorded in the health care facilities and are available on the county level. The lack of appropriate data makes such territorial comparisons impossible, however UNDP have found other relevant data sources. At lower levels of territorial division data concerning disposable income can be calculated on the basis of data from the Internal Revenue. At the same time most of the information in the field of education is available at least on the county level, through the Educational Information System (pol. System Informacji Oświatowej), which was created by the Ministry of Education.

Due to the limited availability of proper data, in order to construct a robust and up-to-date indicator, UNDP decided that the county should serve as the basic unit of this analysis. In Poland there are 314 counties and 65 cities with county rights. The choice is further motivated by public tasks exercised on the county level including education at the secondary level and the healthcare system. Additionally 16 voivode-ships were analysed for regional comparisons.

In order to achieve a high-resolution map of Poland the system of measuring human development should consist of numerous variables. However, as mentioned above proper comparable data is not always available. Complexity and versatility of this measure are desirable, as well. According to ul Haq, too complicated indicator could be too hard to use by the decision-makers. Classic HDI methodology consists of three crucial elements for each individual: life expectancy (health), knowledge (education), and also on the standard of living which would allow living at certain levels of prosperity (represented by the level of income). Barbara Szatur-Jaworska (2008) underlines the fact that the correct choice of social indicators is not only a matter of theory, but also practice as they are applied to formulate goals of various social programmes and to monitor their implementation.

Although, the different dimensional indicators used in the LHDI compared to the standard HDI, the calculation method from the Human Development Report 2010 was used (UNDP 2010). The latest major changes that were introduced to HDI are: the method of aggregation of individual indicators has been changed from the arithmetic mean to geometric mean (to reflect the limited substitution of the individual dimensions of human development), and educational measures were changed: instead of the ability to read and write and the average enrolment rate, the mean of years of schooling was used. To sum up, the LHDI value is calculated using the geometric mean of partial indicators on a scale from 1 to 100. The LHDI value depends on the threshold values, that is on administrative units with best and worst county results for each of the variables. Threshold values are the minimum and the maximum values

observed between 2007 and 2010 for a given variable. The dimensional indices have no weights, because it is difficult to distinguish which of the three: education, health and income are more important than the others.

Table 1 Dimensions of Human Development and the LHDI sub indices

Dimension	Health	Education	Welfare
LHDI sub indicators	Average life expectancy at birth indicator <i>(Estimated life expectancy at birth)</i>	Pre-school education indicator <i>(Enrolment rate of children in pre-school education: 3 to 4 years of age)</i>	Welfare indicator <i>(Average persons welfare level)</i>
	Aggregated mortality index <i>(Aggregate mortality rate due to cancer and cardiovascular diseases)</i>	Lower secondary school exam results index <i>(Average results from the lower secondary schools exam – mathematics and natural sciences only)</i>	
LHDI dimensional indices	Health Index	Education Index	Welfare Index
Local Human Development Index (LHDI) – at county and voivodeship levels			
Human development on a local and regional level			

Source: Own study.

Map of human development in Poland

An income ranking does not always reflect the distribution of human development. The value of the synthetic index is a result of the values of group indices and should be interpreted as a whole. For example, the Lesser Poland voivodeship is second in the LHDI ranking, while the value of its income index is below the average for all voivodeships. The Świętokrzyskie voivodeship has the lowest education results, a higher mortality rate and one of the lowest income levels among the regions analysed. What is more, the voivodeship has fallen in comparison since 2007 by 2 ranks. This situation is due to the lower education results and the growing mortality rate. The same negative effects touch upon the West Pomeranian voivodeship.

The unbalanced spatial distribution of regional development processes in Poland is also historically conditioned, most of all by the phenomena originated in the Middle Ages and the consequences of the partitions of Poland (period which lasted from

1772 until 1918). Due to historical processes and contemporary development conditions, today the Polish territory is characterised by three types of disproportion: development gap between large cities and the rest of the country, between Eastern and Western Poland, and increasing intraregional disproportions, which can be seen in the illustration of human development (map 1 and table 2).

Table 2 Voivodeships ranking according to LHDI value in 2010 and change of voivodeship rank in comparison to 2007

Voivodeship	LHDI ranking	Change of rank in comparison to 2007	LHDI	HI	EI	WI
Mazovian	1	0	60,21	58,18	61,68	60,84
Lesser Poland	2	0	51,93	69,10	57,65	35,15
Pomeranian	3	0	51,14	71,28	47,16	39,79
Greater Poland	4	0	50,22	63,32	50,19	39,86
Silesian	5	0	49,54	48,39	53,92	46,59
Opole	6	0	46,95	59,76	55,94	30,96
Lower Silesian	7	0	46,34	47,61	48,79	42,84
Podlasie	8	1	44,40	66,08	51,60	25,67
Lubusz	9	2	44,36	54,72	47,21	33,79
Podkarpacie	10	0	43,77	72,28	48,15	24,09
West Pomeranian	11	-3	42,89	52,31	42,51	35,48
Warmian-Masurian	12	0	42,33	58,61	41,85	30,93
Kuyavian-Pomeranian	13	0	41,22	49,17	42,31	33,67
Lublin	14	1	39,55	48,61	46,46	27,40
Łódź	15	1	39,28	31,48	52,25	36,85
Świętokrzyskie	16	-2	36,78	45,95	39,18	27,62

Source: Arak et al. 2012.

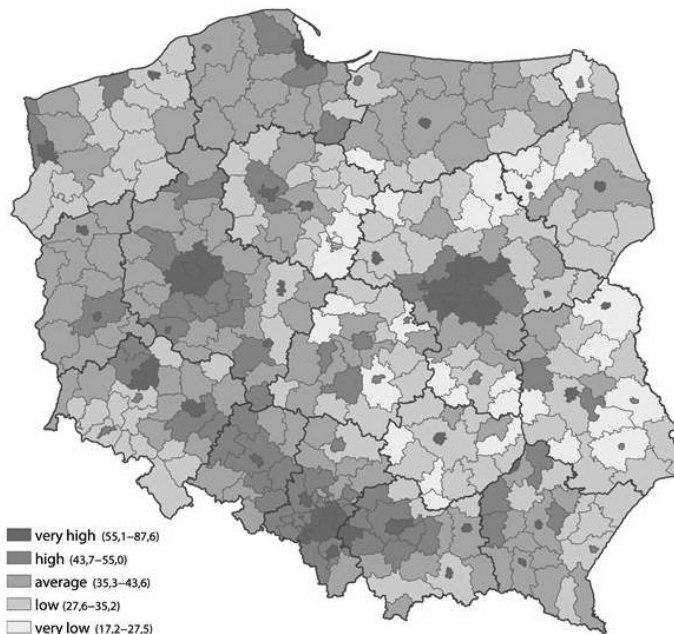
The phenomenon of the “Warsaw Island” is also worth noticing – the Warsaw urban region, significantly influences the high index values for the entire voivodeship, so that consequently the region has the highest level of human development in Poland. At the same time, as we can see in map number 1 the Mazovian voivodeship embraces many counties with low index values and is a perfect illustration of the intraregional disparities.

Nonetheless, one must remember that cities are not heterogeneous. Some of Warsaw’s city districts have lower index values in education and the lifespan varies greatly between the districts of Praga-Północ and Wilanów. On the other hand, it turns out

that Wrocław, Lublin and Głogów are islands of prosperity, the multifaceted picture of Lower Silesian and Lubusz voivodeships is much more complicated. High values of the LHDI are achieved by different partial indicators: education and health place Podlasie, Lesser Poland and Opole voivodeships higher in the ranking, Podkarpackie voivodeship is primarily situated higher by health indicator. On the other hand Upper Silesia has lower values of the LHDI primarily because of the health indicator, whereas Lower Silesia has lower values because of the health and education levels. In this context it is crucial to refer to the territorial cohesion. The essence of this category is not to provide a steady spatial increase, but to integrate spatial development activities with territorial factors (benefits from the metropolitan area, local spatially conditioned assets as for example social capital) in the development process (Zaucha 2012). For example, despite the fact that the Mazovian voivodeship has reached the highest LHDI value among voivodeships, it turns out that among counties the level of human development outside the Warsaw metropolitan area is lower.

Urban centres are the hubs of the economic, social, scientific, cultural and institutional cooperation network, and thereby as centres influencing the development of the entire region, they are of key significance for the development of every region. They are the dark spots on the map seen below.

Map 1 Local Human Development Index in counties in 2010⁵



Source: Own study.

⁵ Counties have been classified into 5 groups from very high, high, average, low to very low level of human development on according to the natural breaks classification method.

Public expenditures on human development

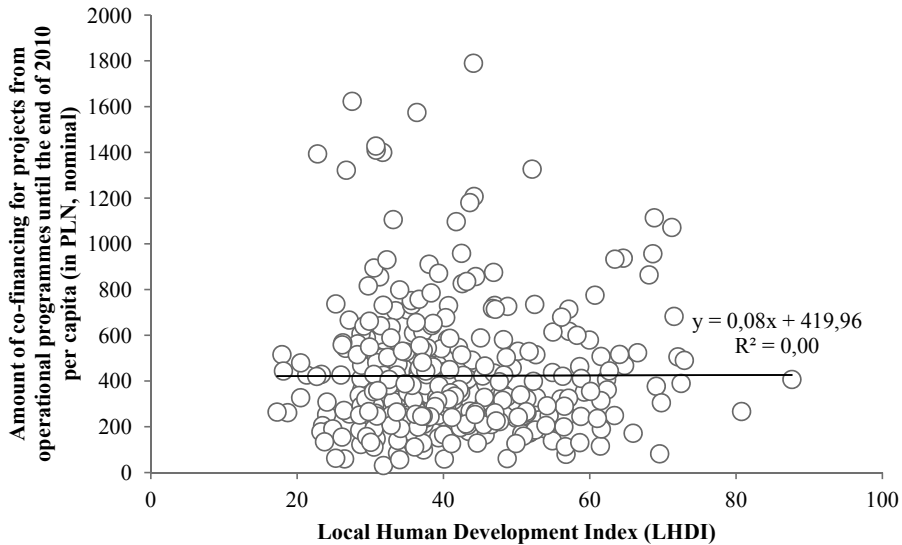
Activities and strategies financed from public funds, including those in the 2004-2006 and 2007-2013 cycles, should be subject to specific standards of measurement, evaluation and meta-evaluation, i.e., the assessment of both planned and conducted evaluations. These standards concern not only the description of activities and justification of public interventions (why are they being done?), but also their outcomes (what has been done and how?). It is particularly important to properly assess whether the interventions being implemented and financed from public funds are effective and useful for the local community, among other things, in terms of human development. In "Reinventing Government" Osborne and Gaebler (1993) justify the need to measure the effects of the projects, programmes and public interventions stating that if success cannot be rewarded, you certainly will reward failure. In case of the Polish development (and cohesion) policy it can mean spending public funds on different irrelevant purposes rather than on those resulting directly from the definition of human development.

To count the inputs (spending) is not the same as to count results. The LHDI, whose relationship with public intervention is analysed in this part of the article, should with a wide timeframe make it possible to measure the effects of the intervention. At this stage, it is worth distinguishing between the concept of "contribution" and "attribution", because the statistical analysis alone does not allow for the clear establishment of a cause and effect relationship between social policy expenditures and the rising and decreasing of human development level. It can only be described as co-occurrence. Expenditures from Human Capital Operational Programme and social policy show that more funds were allocated in regions with lower levels of human development.

The regional policy is aimed at sound management of all financial resources allocated to development that, so far, have been managed by the ministries and other public institutions. Allocation of resources available under individual sectoral policies, according to the territorial approach and the principle of subsidiarity, which enables the self-governments of voivodeships to increase the amount of financial resources for regional policy implementation, and improve the effectiveness of interventions. Local government entities are, next to entrepreneurs, major beneficiaries of EU funds, i.e., funds from the EU budget (European Regional Development Fund, European Social Fund, Cohesion Fund). In the financial framework for 2007-2013, around 25 per cent of EU funds allocated to Poland from structural funds will go to co-finance projects implemented by local governments under National Operational Programmes (NOPs) and Regional Operational Programmes (ROPs). Local government entities, as beneficiaries of EU funds via ROPs, are mostly interested in investment in road construction and upgrades, water and wastewater management, waste management, development of renewable energy sources, and access to broadband Internet for municipal residents. The projects related to innovation, R&D and tourism are

also important but they were associated with the organisation of the 2012 European Football Championship in Poland.

Graph 1 The relationship between the amount of co-financing for projects from operational programmes until the end of 2010, per capita (PLN, nominal) and the value of the Local Human Development Index (LHDI) in 2010, by counties

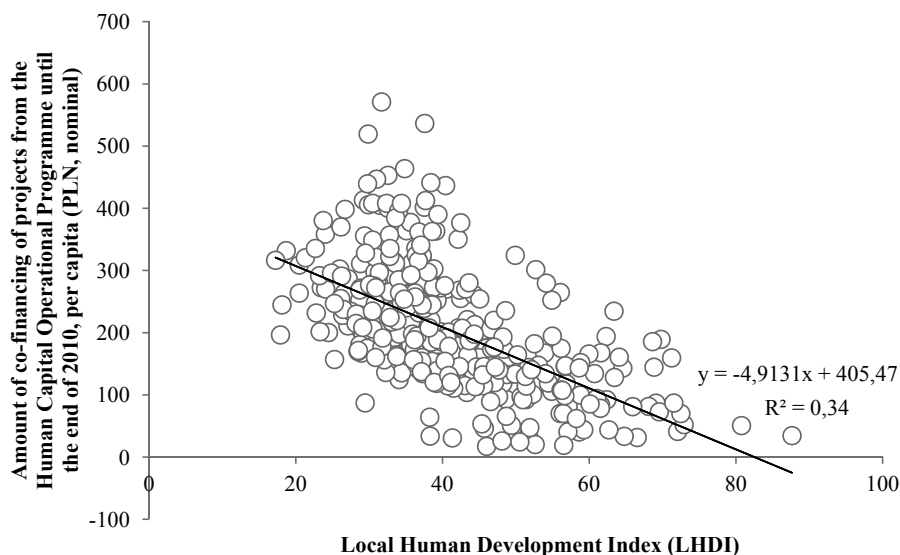


Source: Own study.

The authors of the report on human development in Poland point out that the analysis of the total sum from cohesion policy programs within the National Strategic Reference Framework in conjunction with LHDI indicates a weak correlation. The relationship between spending on projects funded by Operational Programmes (including the Eastern Poland Operational Programme) and the Local Human Development Index is very weak – the linear correlation coefficient is 0.04 (Graph 1). However, after analysing individual operational programmes only one correlation coefficient came up that has strong statistical relationship with human development – it is The Human Capital Operational Programme implemented in 2007-2010. Interestingly, the English term of human development is often translated into Polish as “social development” or, literally, “human development”, which in this case is only a symbolic co-occurrence. The linear correlation coefficient for LHDI 2010 and the resources spent under the Human Capital OP by the end of 2010 is -0.581. It is by far the most significant correlation observed between human development measured by LHDI and cohesion policy spending. The regression line is leaning to the right, which means that the higher human development, the smaller funds from The Human Capital Operational Programme was spent in 2007-2010. It can be concluded that

spending funds from The Human Capital Operational Programme was carried out on the regions of lower level of human development. Therefore, the study confirms the existence of a strong link between human development and expenditures under the Human Capital Operational Programme. Investments in education and skills are among the core factors contributing to increases in incomes and health improvement in a given community.

Graph 2 The relationship between the amount of co-financing of projects from the Human Capital Operational Programme until the end of 2010, per capita (PLN, nominal) and the value of the Local Human Development Index (LHDI) in 2010, by counties



Source: Own study.

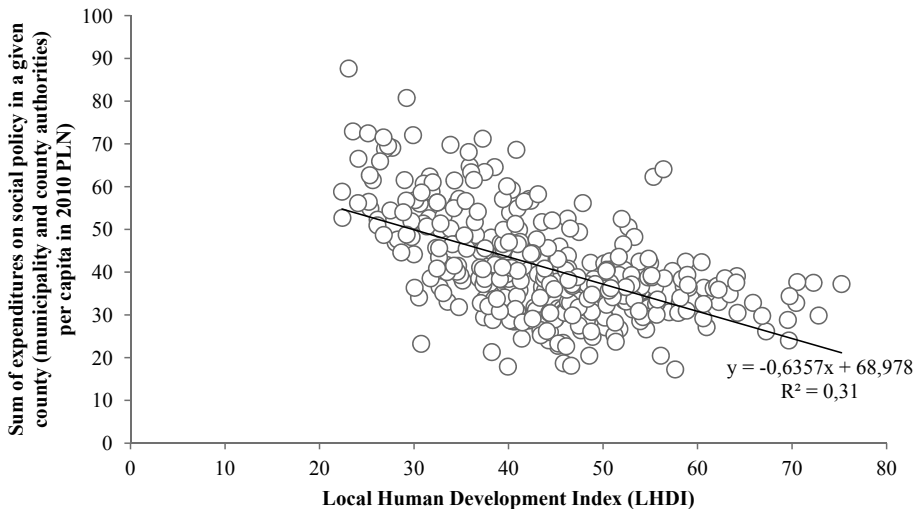
The Human Capital Operational Programme corresponds to about 30 per cent of the total money spent on all programs and priorities of the cohesion policy. Unfortunately, even the graph above is not completely reliable because of the quality of reporting of expenditures under the financial framework of 2007-2013. The analysis is even harder with the data from the financial framework of 2004-2006, because there is no possibility to assign it territorially (Arak et al. 2012). Various data exists but it is far too often unstructured and databases even within one institution are not always coherent. “Information” is abundant but it cannot always be transformed into “data” that is useful for local level policy-making. Polish public institutions need to develop rules for collecting and processing local level data in a coordinated manner, following common standards and methodologies. The lower the level of analysis, the more difficult (but also more interesting and meaningful) it is to analyse.

The fulfilment of the goals and the outcomes of means undertaken through social policy can be most effectively evaluated by the LHDI. According to Danecki (1980)

and Szarfenberg (2011b) the goals of social policy can be universal, but always connected with rising standard of living or human development.

For the social policy the most important issue is the link between human development and the social welfare expenditures – in this particular case in order not to alter calculations – benefits payable in the event of natural disasters were not taken into consideration. The lowest levels of local government, county and voivodeship take on most of the social services. Total expenditure on social services and on other social policy tasks consist of: the sum of welfare benefits and family policy expenditure in the budgets of local governments (municipalities and counties), excluding benefits paid due to natural disasters, divided by the number of inhabitants of the county.

Graph 3 The relation between the sum of expenditures on social policy in a given county (municipality and county authorities), per capita in 2010 (PLN) and the value of the Local Human Development Index in 2010 according to counties



Source: Own study

When reading the graph above, one has to remember that it primarily shows territorial and regional differences and not necessarily the differences in the amount of benefits between particular regions. Regression line is leaning to the right, which means that there is a smaller sum of the social transfers per capita in the voivodeship with a higher level of human development. The amount spent on social policy per capita was higher in the regions of lower level of human development in 2010. The linear correlation ratio between expenditures on social policy and the LHDI is -0.555, which shows a strong relationship between those two variables. The following counties have the highest social policy expenditures: Czuluchów, Elbląg, Bartoszyce, Braniewo, Gryfice, Świdwin, Lipno, Radziejów, Nowe Miasto. The lowest level

of transfers takes place in the following counties: Poznań, Pszczyna, Warsaw-West, Wrocław, Tychy, Skierniewice, Pruszków, Warszawa, Wrocław, Bieruń-Lędzin.

Policies directed at fostering social inclusion must also take into account the geographical concentration of disadvantage. The causes and consequences of poverty and exclusion can often be found clustered together in particular areas, effectively interacting in such ways as to exacerbate and compound each other. Common patterns in the geographical concentration of disadvantage are evident across the map of Poland. Indeed, it is clear that the intrinsic characteristics of poor neighbourhoods (in terms of human development, i.e., income, educational attainment, and health) do not change over time and that geographic exclusion may preclude such areas from being able to exploit wider positive macroeconomic changes. Differences between the experiences of disadvantage and exclusion in rural and urban areas must also be recognised, as social exclusion does not develop in the same ways nor does it take the same forms in these two different contexts. The so-called spatial poverty trap will therefore continue to pose additional challenges to job creation and entrepreneurial development, unless the design and delivery of local development policies (especially social policy) effectively addresses patterns of social exclusion at both the individual and community levels. Accordingly, the territorial element of social exclusion and level of human development is an important one to consider when designing and implementing active social policies on sub-national level.

Summary

Intraregional differentiations in Poland can increase, provided that they do not happen at the expense of the weakest parts and groups of people in the country. According to Jan Danecki (1974), achieved standard of living and quality of life, degree of equality and justice, harmony of coexistence, and the influence of the wide circles of the societies on direction of changes reflect human development in the greatest degree. It is hard to disagree that the aims of human development are closely connected with social policy. An attempt to describe reality by means of a new indicator can help with social diagnosing. This tool can help to explain why some regions are poorer and the other ones are wealthier. The results should be taken with a moderate approach since the parts of the indicators from the field of health care need further investigation. They lack reflection of morbidity rate instead of mortality rate, due to limited availability of data. Changes that take place in Poland, especially in living conditions and in social transformations, need more and more versatile and up to date empirical knowledge. The LHDI should provide monitoring of those changes and facilitate making favourable decisions concerning policy intervention.

Local Human Development Index in comparison with expenditures on the one hand on social policy and on the other hand on Human Capital Operational Programme proves that public funds are mostly allocated in counties with lower levels of human development. It means that when planning regional policy in the new financial

perspective (2014-2020), the European Social Fund (currently the Human Capital Operational Programme but it will be replaced with a new one in 2014) should be assigned more appropriately and spent on projects performed in poorer regions.

The lack of evidence that EU funding is provided for projects in underdeveloped regions means that the government should put pressure on using the so-called territorial contracts. The new territorial contract enables the government and the self-government of the voivodeship to agree on the most important objectives and projects implemented (and financed) under the regional development policy. The contract applies only to those projects, whose implementation is significant in terms of government regional policy and self-governments development policy. Most of the projects agreed in the form of a contract should be implemented on the areas of strategic intervention, i.e., with low LHDI value. This will preserve the principle of geographical and thematic focus of the measures. Thereby, sectoral interventions will be also adjusted to regional needs.

The actors performing projects from EFS funds should be seeking to tackle the complex dynamics underpinning poverty. It is this complexity, which demands that policies, if they are to be effective, must be coherent in their design and implementation. This means not only across government departments but also between national and sub-national levels of government, as well as involving and incorporating other actors in the design and implementation of policies. The most critical opportunity for encouraging social inclusion lies in the development of active social policies on the local level which seek to increase access to economic opportunities (or as Amartya Sen would put it “capabilities”). Such policies can address education and training short-falls for both young people and adults, as well as the provision of employment opportunities for those who experience difficulties accessing employment as a result of long-term unemployment, poor skill levels, health problems (also those undiagnosed) or disadvantage due to disability. They can also contribute to incorporating older people into economic activity, thereby addressing the challenges of ageing populations. By equipping individuals with the necessary skills, e.g., digital competences to access economic opportunities and thereby helping them to avoid the poverty trap of welfare dependency, vulnerability to risk factors for social exclusion is reduced and intergenerational outcomes improved. Social economy is an example of improving the capabilities of the disadvantaged performed in the cooperation of local governments and NGO's, but still on a small scale in Poland.

Funds spent from the Operational Programmes should be further studied for the directly observable effects of the intervention, because – as we can see from the lack of relationship between fund allocation and human development – the rich regions benefit from cohesion policy just as much as the poorer ones. From this perspective, it seems necessary to create a consistent system of evaluation based on the data on financial flows, the benefits in terms of employment, the discontinuation in use of social services and the duration of the project (both as part of the social policy and projects financed from the European funds). For these purposes administrative

records from the Social Insurance Institution, Ministry of Finance, Ministry of Labour and Social Policy and the Ministry of Regional Development can and should be used.

References

- Arak P., Peleah M., Rakocy K., Ivanov A., Płoszaj A., Rok J., i Wyszowski K. (2012) *Krajowy Raport o Rozwoju Społecznym. Polska 2012. Rozwój regionalny i lokalny*, United Nations Development Programme, Warszawa.
- Borys T. (2005) *Wskaźniki zrównoważonego rozwoju*, Wydawnictwo Ekonomia i Środowisko, Warszawa-Białystok.
- Broda, G. i Olsińska, E. (2011) *Stan zdrowia mieszkańców Warszawy w latach 1999-2008*, Urząd Miasta Stołecznego Warszawy, Warszawa, http://www.um.warszawa.pl/sites/default/files/attach/o-warszawie/stan_zdrowia.pdf [access 5.05.2013].
- Danecki, J. (1974) *Postęp społeczny a postęp ekonomiczny*, in: J. Danecki (ed.), *Społeczne aspekty rozwoju gospodarczego*, Państwowe Wydawnictwo Naukowe, Warszawa.
- Danecki J. (1980) *O postępie społecznym i polityce społecznej*, in: I. Sieńko (ed.), *Rodzód, rozwój i perspektywy polityki społecznej w Polsce*, Instytut Polityki społecznej UW, Warszawa.
- Golinowska, S. (2006) *Decentralizacja władzy a funkcje socjalne państwa i rozwiązywanie problemów społecznych*, in: M. Boni i S. Golinowska (eds.), *Nowe dylematy polityki społecznej*, CASE-Centrum Analiz Społeczno-Ekonomicznych, Warszawa, http://www.case-research.eu/upload/publikacja_plik/28661030_RC_65.pdf [access 20.05.2013].
- Ivanov, A. i Peleah, M. (2011) *Disaggregation of Human Development Index. Opportunities and challenges for local level policy-making*, United Nations Development Programme, Bratislava, <http://europeandcis.undp.org/ourwork/poverty/show/11F90F12-F203-1EE9-B34D716C2DB36555> [access 21.05.2013].
- Jastrzębska, M. (2012) *Finanse jednostek samorządu terytorialnego*, Wolters Kluwer Polska, Warszawa.
- Kurowska, A. (2011) *Wskaźniki społeczne w polityce społecznej. Historia, teoria i zastosowanie w praktyce*, Difin, Warszawa.
- Ministerstwo Rozwoju Regionalnego (2012) *Średniookresowa Strategia Rozwoju Kraju*, Warszawa.
- Osborne, D. i Gaebler, T. (1993) *Reinventing Government. How the Entrepreneurial Spirit is Transforming the Public Sector*, Plume, New York.
- Panek, T. (2011) *Ubóstwo, wykluczenie społeczne i nierówności*, Szkoła Główna Handlowa w Warszawie, Warszawa.
- Sen, A.K. (1993) *Inequality re-examined*, Harvard University Press, Cambridge.
- Stiglitz, J.E., Sen, A.K. i Fitoussi, J.-P. (2009) *Report by the Commission on the Measurement of Economic Performance and Social Progress*, Paris, <http://media.ft.com/cms/f3b4c24a-a141-11de-a88d-00144feabdc0.pdf> [access 15.05.2013].

- Szarfenberg, R. (2008) *Marginalizacja i wykluczenie społeczne*, <http://rszarf.ips.uw.edu.pl/wykluczenie/> [access 25.05.2013].
- Szarfenberg, R. (2011a) *Rozwój społeczny, czyli detronizacja PKB*, <http://rszarf.ips.uw.edu.pl/pdf/KrytykaPKB.pdf> [access 15.05.2013].
- Szarfenberg, R. (2011b) Wpływ koncepcji rozwoju społecznego na politykę społeczną, http://rszarf.ips.uw.edu.pl/pdf/rozwoj_spoleczny.pdf [access 15.05.2013].
- Szatur-Jaworska, B. (2008) *Diagnoza i diagnozowanie w polityce społecznej*, in: G. Firlić-Fesnak i M. Szyłko-Skoczny (eds.), *Polityka społeczna*, Wydawnictwo Naukowe PWN, Warszawa.
- Szumlicz, T. (1994), *Modele polityki społecznej*, Szkoła Główna Handlowa, Warszawa.
- Haq, M. (2003) *The Birth of the Human Development Index*, in: S. Fukuda-Parr i A. K. Shiva Kumar (eds.), *Readings in Human Development*, Oxford University Press, Oxford.
- UNDP (2010) *Human Development Report 2010. The Real Wealth of Nations: Pathways to Human Development*, Palgrave MacMillan, New York, http://hdr.undp.org/en/media/HDR_2011_EN_Contents.pdf [access 4.05.2013].
- UNDP Poland (2006) *Wykluczenie i integracja społeczna w Polsce. Ujęcie wskaźnikowe*, UNDP Poland, Warszawa, <http://rownosc.info/customers/rownosc/web/attachments/f38f043bf101be59dab4973ad3e9312e7342d075.pdf> [access 7.05.2013].
- Zaucha, J. (2012) *Synteza aktualnego stanu wiedzy dot. rozwoju systemowego i spójności terytorialnej w planowaniu przestrzennym. Analiza dokumentów UE, BSR i polskich*, Working Papers no. 001/2012, Institute for Development: Sopot, http://www.institut-rozwoju.org/WP/IR_WP_5.pdf [access 8.05.2013].

Streszczenie

W artykule prezentowane jest podsumowanie metodyki liczenia i wykorzystania miary rozwoju społecznego w Polsce. Program Narodów Zjednoczonych ds. Rozwoju (UNDP) przygotował nową miarę dla polskiego rządu. Lokalny Wskaźnik Rozwoju Społecznego został stworzony na podstawie istniejącego Wskaźnika Rozwoju Społecznego i jest użyty do pomiaru rozwoju społecznego na poziomie powiatu i województwa. Wskaźnik bazuje na danych dostępnych w statystyce publicznej oraz rejestrach administracyjnych. W artykule badano zależność między terytorialną alokacją środków polityki spójności, Programu Operacyjnego Kapitał Ludzki oraz wydatków polityki społecznej z poziomem rozwoju społecznego. Efektem czego jest potwierdzenie hipotezy o wydawaniu środków, w ramach tych interwencji publicznych, do regionów o niższym poziomie rozwoju społecznego, ale także sugestia co do lepszej strategii wydawania środków z polityki spójności.

Słowa kluczowe: rozwój społeczny, powiat, kapitał ludzki, polityka społeczna, pomiar

Sławomir Kalinowski

*Department of Economics
Poznań University of Life Sciences*

Selected aspects the economic situation in rural households with precarious income

Summary

The main objective of this paper is to highlight some aspects of the economic situation of households with uncertain income. The article presents a subjective assessment of the respondents about changes in their household budget in the past, and the anticipation of change in the near future. On the basis of interviews, an assessment of the level of satisfaction of selected household needs of the rural population of uncertain income was conducted. It also presents areas of life in which most respondents are forced to make savings. Empirical material contained in the article comes from studies carried out in the framework of research project number UMO-2011/01/B/HS5/01034 funded by the National Science Center, on the title “The standard of living of the rural population of uncertain income in Poland” and they are part of the project. Survey interviews were conducted in 2012 among the rural population of uncertain income in Poland.

Key words: uncertainty of income, the economic situation, rural areas

Introduction

Precariousness is an essential attribute of contemporary times. It concerns almost all aspects of human life – both the economic situation and non-economic aspects: consumption, work, social conditions, economy, environment in its broad sense or challenges related with civilisation and culture. Nowadays the precariousness of income, which results from the system and conditions of employment, has special significance. Unemployment or part-time employment as well as atypical terms of employment are some of the elements affecting the likelihood of social and economic exclusion. Additionally, it is both the cause and effect of relatively lower competitiveness of households with unemployed people, illegally employed, people with flexible forms of employment or forced self-employment. The growing importance of precarious income results from the increasing occurrence of flexible and precarious forms of employment in recent years. As a result, they favour the disparity of income and expenses and another structure of consumption, which is usually less effective. This causes difficulties in the functioning of society.

Methodology

The empirical material included in the article comes from the investigations conducted within research project No. UMO-2011/01/B/HS5/01034, financed by the National Science Centre and titled *The Living Standard of Rural Population with Precarious Income in Poland*, and is part of them. The research was conducted between June and the first half of July 2012. The size of the research sample was 1067 adult respondents, who were the inhabitants of rural areas in Poland. The information about the population under investigation was obtained by means of the research tool, i.e. the research questionnaire, which simultaneously became the research scenario of the direct PAPI (paper and pencil interview) method.

The research sample was representatively selected according to the formula for an unknown faction, where the assumed significance level was 0.05 and the size was retained. Due to the fact that an ‘unknown’ population was investigated (there is no research on people with precarious income, which would enable assessment of their demographic distribution), the only possibility was to apply the quota sample, which was equally divided according to voivodeships and demographic traits (sex, age). The sex was determined according to the Local Data Bank (Central Statistical Office). However, it was only an approximate size, because during the preparations for the research it was impossible to specify the ratio between the men and women meeting the input criterion. On the other hand, the sample size in individual voivodeships depended on the population of rural communes in those voivodeships and it ranged between 26 in Lubusz Voivodeship and 133 in Masovian Voivodeship. The statistical error for the whole country was assumed at 3%. Thus, it is possible to say that the sample is representative, because the proportions between the most important

major traits were retained and in consequence, the percentage in the sample equals the percentage in the population. The sample was randomly selected.

Precariousness of income

Precariousness is an important trait of economic and social life and it is one of the qualities of human activity. According to the Polish dictionary, PWN (2007), something precarious includes the element of risk and it is difficult to predict it. However, this definition does not adequately describe the phenomenon, because in economics risk is the phenomenon where it is possible to identify the result by means of probability, although it is difficult. As far as precariousness is concerned, it is impossible to determine the probability of its occurrence due to the absence of statistical parameters of assessment of the frequency of event occurrences (Zalega 2008, p.17). According to Maciejewski (2010, p.38), the states of risk and precariousness coincide and sometimes they are identified with each other. When Samuelson, Marks (1998, p.323), Willet (1951), or Knight (1921) analysed the problem of precariousness, they used the terms *precariousness* and *risk* interchangeably. According to Willet, risk is an objectivised uncertainty concerning the occurrence of an undesirable event. On the other hand, Knight thought that risk was a measurable uncertainty. Pfeffer (1955, p.24) analysed and combined the two concepts and in consequence, he found that the measurability of uncertainty is only limited to belief. In other studies, e.g. Bolesta-Kukułka (2003, p.190), precariousness as an element of the decision-making conditions is distinguished from risk, which is the consequence of choice in a particular decision.

When analysing the precariousness of income it is necessary to take its unpredictability, indeterminacy and discontinuity into consideration. In this aspect unpredictability is related with the impossibility to determine if the consumer can gain any income. This results from the difficulty determining if the individual will be employed in a particular period of time, or possibly what their working time will be, and from the difficulty in receiving a social security benefit. Indeterminacy results from the atypical activity and/or source of income. Discontinuity is the result of temporary employment or employment in selected, short periods, whereas the income itself is sporadic. These traits make it impossible to determine the objective probability of receiving remuneration or other income. In this sense precariousness could be identified with certain fortuity and can be used as a synonym of doubt.

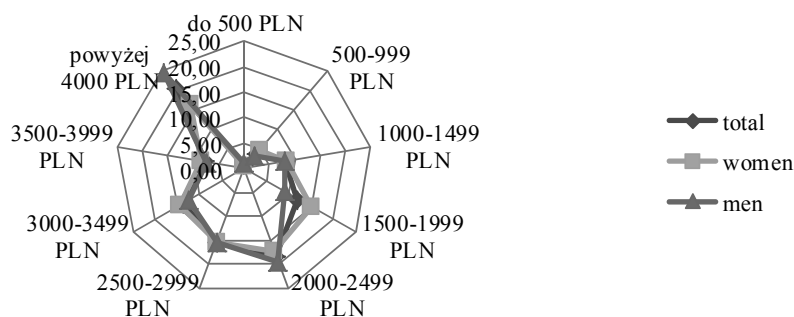
Income structure

The main element providing information about the economic situation of the population is the income gained by household members. Although it is not a sufficient factor, which could definitely determine one's living standard, it is decisive to the degree one's material and immaterial needs are satisfied. This results from the

fact that the income level exerts significant influence on the demand volume and structure. Apart from that, it is a key component of the material factor in its broad sense, which is a constituent of the existence of the household. For further considerations it is also important to take into account the statement that although income is more susceptible to fluctuations than expenses, research findings indicate that the trends showing the scale of poverty and social exclusion are usually similar to each other. In spite of numerous weaknesses of the assumed measure, in the conditions of market economy the correlations between income and the degree of deprivation are so considerable that the measure can be assumed to be an adequate index describing people's living standard (Golinowska 1996, p.19).

It is possible to see from the research that men declare higher income than women (Diagram 1). Men declare that the average income of all household members is 3,207.02 zlotys, whereas women estimate it at 2,828.44 zlotys. Thus, it is possible to assume that the amount of declared income is influenced by the feelings concerning one's earnings, which are usually higher for men⁶. In the households under investigation the average income slightly exceeds 3,000 zlotys, but the standard deviation is nearly 2,000 zlotys, which indicates considerable diversification in the income of the population under study. The income in the first decile reaches about 1.3 thousand zlotys, whereas in the last decile it is 5,000 zlotys.

Diagram 1. Gender-dependent respondents' declarations of the amount of income in households



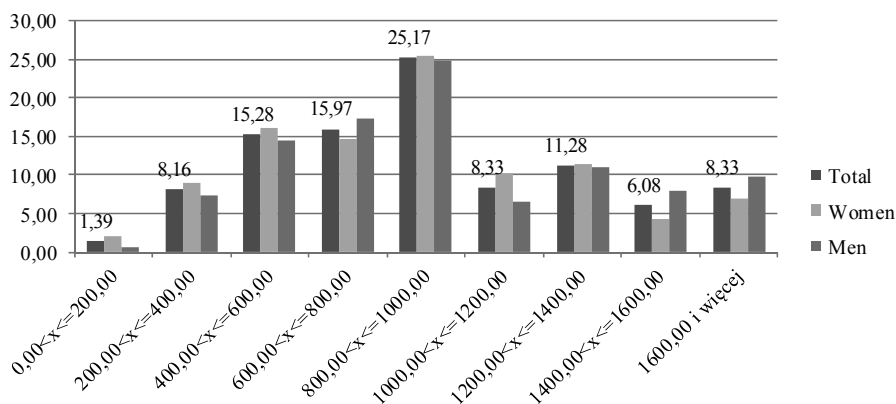
Source: The author's own research, UMO-2011/01/B/HS5/01034, n=1067.

Above all, it is the disposable amount of income per capita rather than the overall income in households that is important for analyses. The rank of this category results from the special information it carries in the process of economic analysis, because it enables greater comparability of households with different demographic composition. As results from the research (show?), the median of disposable income

⁶ Social Diagnosis indicates that on average women's income is from 1/4 to 1/5 lower than men's.

per capita is 900, whereas the mean value slightly exceeds 1,000 zlotys. The average income per capita in the first decile is 3.6 times lower than in the last one (the ratio for households was 3.9). Apart from that it is also noticeable that in 1.39% of all the households under study the income per capita was extremely low (less than 200 zlotys), whereas low income was declared by nearly every tenth respondent (Diagram 2).

Diagram 2. The amount of income per capita in households with precarious income



Source: as in Diagram 1.

There is strong, right-sided asymmetry of income, with the majority of households with a low level of these variables. In consequence, the average level of income expressed arithmetically is strongly overestimated in comparison with the median (the overall income in households is overestimated by slightly more than 500 zlotys, whereas the income per equivalent unit is overestimated by more than 100 zlotys). Thus, the trend in income diversification is similar to standard households. However, in the households of people with precarious income we can observe smaller differences between the ninth and first decile than in the entire society, and the ratio value is 1.68⁷ lower for households and nearly 0.4 lower for equivalent units. But it is difficult to decide whether or not this situation is desirable, because both excessive egalitarianism and excessive income diversification may be unfavourable and threaten the development both of the units themselves and the entire economy in a country.

Poverty of rural inhabitants with precarious income

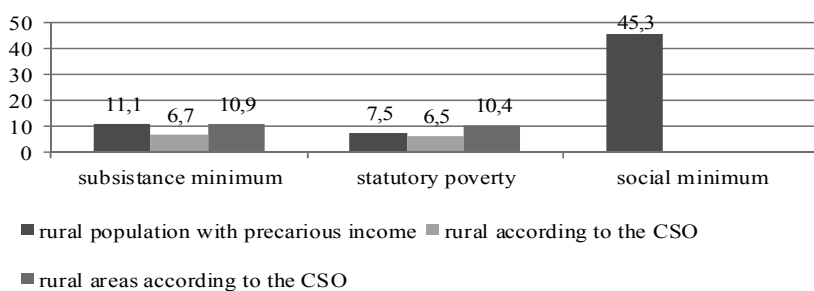
Poverty is important information about the economic situation and simultaneously, it is the consequence of the lack of appropriate amount of income. The poverty ratio is defined as the number of people whose equivalent income is lower than the pre-

⁷ The ratio for the entire society according to Social Diagnosis 2011.

defined (objective, subjective, relative) limit. Objective measures may be set by the amount below which people's existence is threatened (subsistence minimum), the amount which gives the right to receive a benefit (statutory poverty) or the amount below which there is the danger of failure to satisfy one's needs (social minimum). The first line of consumption lets one live in good health and enables work. It meets the needs which cannot be postponed (Deniszczuk, Sajkiewicz 1997). Due to the fact that consumption under the subsistence minimum may lead to biological devastation, it is treated as extreme poverty. It is possible to notice the fact that this limit makes each ninth rural inhabitant with precarious income extremely poor. This number is similar to the number of extremely poor people quoted by the Central Statistical Office (Diagram 3).

If statutory poverty is taken into consideration, the people whose income per capita does not exceed 351 zlotys, or 477 zlotys⁸ for single people, are regarded as poor. As the limit was set at that level, the number of people without the possibility to satisfy their needs reached 7.5% among the population with precarious income, whereas the analogical ratio quoted by the Central Statistical Office was 10.4% for rural areas and 6.5% for the entire country (Diagram 3). The low poverty limit which gave statutory rights to receive cash benefits from the social security system⁹ caused the situation where some people living below the subsistence minimum could not receive benefits and according to the regulations, they were not classified as extremely poor in spite of the fact that their income was insufficient to satisfy their minimum needs. However, if the income limit set after September 2012 was assumed, according to this criterion, the volume of the poor faction would increase to 11.5%.

Diagram 3. The range of objective poverty



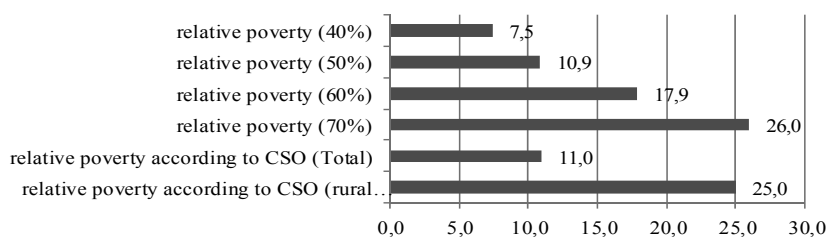
Source: as in Diagram 1.

⁸ The amount as of September 2012, i.e. the time of research.

⁹ For a family of four people the limit was 1,404 zlotys (gross) (until September 2012) and 1,824 zlotys (when the limits were de-frozen), whereas the corresponding subsistence wage limit was 1,771.96 zlotys (the yearly average in 2012).

Relative lines of poverty are also used to determine the economic situation. What speaks in favour of this interpretation of poverty is the fact that it is not possible to talk about absolute destitution, which is relative, depending on the country and socioeconomic conditions. However, this definition of the level of poverty should be identified with social inequality rather than actual poverty and according to Panek (2007, p.267), it should be identified with the excessive spread in society's income level. The poverty limit increases as the median of income distribution grows. It is noticeable that the faction of poor rural population with precarious income set on the basis of the standard limit (60% of the income distribution median) is 7% lower than the total of rural inhabitants designated by the Central Statistical Office and nearly 6% higher than the poor people faction in Poland (Diagram 4). This proves the fact that the spread of income in the rural population with precarious income is smaller than in other groups.

Diagram 4. The range of relative poverty



Source: as in Diagram 1.

The determination of the economic situation of the rural population with precarious income also requires surveying respondents' feelings about their living standard. The individual perception of one's living enables assessment of the respondents' feelings about the extent to which they are deprived of their needs. Depending on the method assumed, the size of the poor faction varies considerably. According to the LPL method, the number of people classified as poor reaches 34.7%. In this case those people are regarded as poor whose individual limit of poverty assumes the income level where the critical value corresponds to the response variants which assess the income as hardly sufficient. The size of the poor faction increases to 43.4% when it is determined with the SPL method. In this case, in order to determine the poverty limit, it is necessary to specify the income which lets people 'make ends meet'. Simultaneously, this income shows people's minimum needs. The highest percentage of people endangered with poverty can be seen when Deleeck's method is applied to determine the poverty limit (65.1%). In this case the people who are regarded as poor are those who think they can hardly 'make ends meet' or they are unable to do so.

It is noticeable that the respondents are somewhat inconsequent when they determine the income which is hardly sufficient and which lets them 'make ends meet'. The

mean deviation in the amounts they declared was higher than 500 zlotys. The respondents were more often of the opinion that the income which lets them 'make ends meet' is good rather than hardly sufficient. Thus, the questions arise what the significance of the benefits received by rural inhabitants with precarious income is, which lifestyles they adopt and what expectations the surveyed group has about their potential income.

The satisfaction of the needs of rural inhabitants with precarious income

The economic situation may be assessed according to the extent to which one's needs are satisfied. The assessment of the satisfaction of these needs depends on a wide range of factors, some of which are objective and others which are subjective. It is possible to follow Duesenberry's (1952, pp. 44-48) assumption that the assessment results from the comparison of consumption expenses and income in a particular household with the expenses and income in other households. Thus, the degree of satisfaction with one's economic situation fluctuates. It is noticeable that there is high correlation between the satisfaction of one's needs and the adequate satisfaction of the needs of the people from the nearest neighbourhood. Thus, it is possible to assume that most consumers follow the behaviours and patterns presented by the individuals who are the nearest point of reference (neighbours, family, and groups of friends) with or without being aware of this fact.

Other people's consumption patterns and the assessment of those patterns enable consumers to assess their own financial situation and thus they influence the assessment of satisfaction of one's needs. As the results from the survey show, most respondents think that their economic situation is similar to the situation in other households. Women tend to assess their financial situation slightly worse than men. The satisfaction with one's situation is influenced by one's education – the people with higher education assess the degree of satisfaction of one's needs better than the people whose education is not higher than the vocational level (Table 1). On the one hand, this may be affected by the relatively higher earnings in the first group, whereas on the other hand, this may be caused by the awareness of the much worse situation of other social groups. Higher education also affects the assessment of one's poverty. Some people do not want to admit it in spite of the fact that their situation is relatively worse, because they are afraid of stigmatisation. According to Lister (2007, pp. 140-146), this results from the belief a poor person is seen as lazy, weak or defenceless. Bauman (2004, p. 27) adds that poor people are treated as passive addressees of social actions evoking the feeling of compassion. This approach explains why there are so many respondents who think that their situation is similar to others'. Thus, poor people should be sought both among those who assess their situation as worse and among those who assess it similarly to other members of society. It is interesting to observe the situation of people with post-secondary education, who are relatively the least frequently of the opinion that their situation is better than in

other households. These assessments can be accounted for by those people's failed expectations about the improvement of their education, which did not result in better jobs and regular earnings.

Table 1. The assessment of the respondents' economic situation in comparison with other members of society

	Better	Worse	Similar	I don't know
TOTAL	8.2	20.2	49.7	21.8
Women	8.3	21.0	49.5	21.2
Men	8.2	19.4	49.9	22.5
Higher	12.0	9.9	53.6	24.5
Post-secondary	4.9	18.3	48.8	28.0
Secondary vocational	5.7	25.1	50.7	18.5
Secondary comprehensive	10.3	15.2	54.4	20.1
Vocational	7.3	24.7	50.2	17.8
Middle school or lower	7.8	29.1	30.1	33.0
18-24 years	7.9	14.0	56.7	21.3
25-34 years	9.8	22.5	48.9	18.9
35-44 years	8.2	21.2	50.2	20.4
45-54 years	8.7	18.0	52.5	20.8
55-64 years	4.1	26.0	39.8	30.1
65 or more years	9.7	16.1	35.5	38.7

Source: as in Diagram 1.

The aim of households is to satisfy both their individual and joint needs. This effect can be achieved by the application of a combination of disposable financial assets, the funds for consumption and the cash for other goods (Becker, 1990, p. 165). As results from the research, in nearly half of the households of people with precarious income the combination of those assets usually boils down to the satisfaction of basic needs. Simultaneously, it turns out that every thirteenth household is unable to satisfy even its minimum needs and in some of those households there is not even enough cash to buy food. Barely 15.4% of households manage their financial assets so that they can save some for the future (Table 2). On the basis of the responses it is possible to assume that the people who replied 'no' or whose management method boils down to the satisfaction of basic needs are in real danger of poverty. The size of the poor households faction determined in this way (57.3%) is comparable with the percentage of people who are unable to satisfy their needs, calculated according to Deleeck's method. Usually the respondents were forced to abandon their expenses on culture (34.1%), clothing and footwear (30.0%) and extra activities (24.3%). At the same time, besides the expenses on home these are the needs without which they can sur-

vive most easily. As the results from the research show, the respondents satisfy their needs related with tourism and recreation, culture and health in the smallest extent.

Table 2. Cash management in a household

	Total	Women	Men
Yes, we are still saving for the future	15.4	15.1	15.7
Yes, all, but we are not saving for the future	27.3	26.8	27.8
Yes, but only the necessities, i.e. expenses on food, clothes and home	23.0	24.3	21.5
Yes, but we have to be very thrifty	25.5	22.8	28.4
Yes, but only on food	1.8	2.3	1.2
No, we do not satisfy our needs related with health, culture and education	3.8	5.2	2.3
No, we do not satisfy all our needs related with home, clothes and food	2.3	2.7	2.0
No, sometimes there is not even enough money for food	0.9	0.7	1.2

Source: as in Diagram 1.

It is worth remembering that the use of the methods which rely on respondents' declarations does not always classify really poor people as poor and vice versa. Subjective surveys on their own cannot be the only criterion of classification into the poor faction (Kahneman, Krueger 2006, pp. 3-24). Some people may think that their situation is better than others' due to their experience and current living standard. In view of this fact they may think they are not threatened by marginalisation. On the contrary, although some people satisfy their needs according to a specific standard, they say that they are not satisfied with the standard. In consequence, there is dissonance between the current status quo and the expected status and thus they have a lower opinion about reality.

Conclusion

The research confirms the fact that the economic situation of rural households is relatively worse than in the entire society. No matter what the assumed poverty limit is, it is noticeable that the percentage of people deprived of the possibility to satisfy their needs is much higher than in the measures of the Central Statistical Office, which take all the surveyed individuals into account. Simultaneously, it is noteworthy that many households do not satisfy even their basic needs and only in every seventh household its members are able to make savings for the future. The unfavourable situation of the surveyed group gives grounds for the conclusion that it is necessary to apply individualised tools addressed directly to people with precarious income in

order to prevent their social exclusion and the unfavourable structure of consumption, which deprives them of the possibility to use goods.

To sum up, we can conclude that the state is obliged to ensure protection of this group to a certain extent so as to prevent the adverse social consequences related with the precariousness of employment, its instability and the feeling of exclusion due to the character of the source of income. However, the form of aid needs to be well-thought so that it can have long-term consequences. Simultaneously, it is important to prepare the framework of aid in the manner that would prevent the development of passive approaches and behaviours deepening poverty and helplessness. The policy should have a flexicurity character and actively counteract unemployment and illegal employment. It is also important that the people who have atypical forms of employment should have similar terms of employment and the choice of such forms should be voluntary.

References

- Bauman Z. (2004) *Życie na przemiał*, wyd. 2, Wydawnictwo Literackie, Kraków.
- Becker G. S. (1980) *Ekonomiczna teoria zachowań ludzkich*, PWN, Warszawa.
- Bolesta-Kukułka K. (2003) *Decyzje menedżerskie*, PWE, Warszawa, s. 190.
- Deniszczuk L., Sajkiewicz B. (1997) *Kategoria minimum egzystencji*, in: S. Golinowska (ed.) *Polska bieda II. Kryteria, ocena, przeciwdziałanie*, IPiSS, Warszawa.
- Duesenberry J.S. (1952) *Income, Saving and the Theory of Consumer Behavior*, Harvard University Press, Harvard-Cambridge.
- Golinowska S. (1997) *Badania nad ubóstwem. Założenia i metoda*, in: S. Golinowska (ed.) *Polska bieda II. Kryteria, ocena, przeciwdziałanie*, IPiSS, Warszawa, s. 19.
- Kahneman D., Krueger A.B. (2006) *Developments in the Measurement of Subjective Well-Being*, "Journal of Economic Perspectives", 20/1.
- Knight F.H. (1921) *Risk, Uncertainty and Profit*, Boston.
- Lister R. (2007) *Bieda*, Wyd. Sic!, Warszawa.
- Maciejewski G. (2010) *Ryzyko w decyzjach nabywczych konsumentów*, Wyd. UE w Katowicach, Katowice, s. 38.
- Panek T. (2007) *Ubóstwo i nierówności*, in: T. Panek (ed.) *Statystyka społeczna*, Polskie Wydawnictwo Ekonomiczne, Warszawa.
- Pfeffer I. (1956) *Insurance and economic theory*, Irwin Inc. Homewood, Illinois 1956, s. 24.
- Samuelson W.F., Marks S.G. (1998) *Ekonomia menedżerska*, PWE, Warszawa, s. 323.
- Willet A.H. (1951) *The Economic Theory of Risk Insurance*, Philadelphia, s. 6.

Streszczenie

Głównym celem artykułu jest zwrócenie uwagi na wybrane aspekty sytuacji ekonomicznej gospodarstw domowych o niepewnych dochodach. Artykuł ukazuje subiektywną ocenę respondentów dotyczącą zmian zachodzących w budżecie ich gospodarstw

domowych w porównaniu z przeszłością, a także przewidywanie zmian w najbliższej przyszłości. Na podstawie wywiadów, dokonano oceny poziomu zaspokojenia wybranych potrzeb w gospodarstwach domowych ludności wiejskiej o niepewnych dochodach. Przedstawiono również dziedziny życia, w których respondenci w największym stopniu są zmuszeni do wprowadzania oszczędności. Materiały empiryczne zawarte w artykule pochodzą z badań przeprowadzonych w ramach projektu badawczego nr UMO-2011/01/B/HS5/01034 finansowanego przez Narodowe Centrum Nauki pt. Poziom życia ludności wiejskiej o niepewnych dochodach w Polsce. Wywiady ankietowe przeprowadzono w 2012 roku wśród ludności wiejskiej o niepewnych dochodach na terenie Polski.

Słowa kluczowe: niepewność dochodów, sytuacja ekonomiczna, obszary wiejskie

Anna Kurowska

Institute of Social Policy, University of Warsaw

Marta Tomaszewska

Institute of Sociology, University of Warsaw

***Differences in fulfilling the entitlement
to pre-school education in Masovian voivodship –
in search of political conditions
of local social citizenship***

Summary

In the present paper, we analyse the differences in the use of pre-school education from the point of view of local social citizenship theory. Adopting this perspective means that, the level of diffusion of pre-school education reflects the level of entitlement to this type of education, an ingredient of the “social element of citizenship”. Thus, in accordance with Marshall and his followers, we consider social citizenship most of all as a political phenomenon. Considering both economic (labour market conditions) and cultural (commune type: village vs. town) conditioning of local demand for pre-school education services, we shall concentrate on analysing local, political conditions of fulfilling the entitlement to this type of education. We shall also test the hypothesis, widespread in hitherto literature on the subject, of the basic difference factor for the participation in pre-school education being the commune’s own income *per capita*. In the present paper, we demonstrate that the difference in political

activity of the inhabitants of communes, measured by local turnout (in parliamentary elections) is correlated to the level of fulfilment of pre-school education entitlement to a much higher extent than the differences between the commune's own income *per capita*. The present paper demonstrates the results of the first stage of analysis of the political conditions of local social citizenship within the "Local social citizenship in social policy: the example of care services for children under 5"¹.

Key words: local social citizenship, participation in pre-school education, political participation

Introduction

The differences in participation in pre-school education on the local level in Poland are fairly well-described in the literature on the subject (Dziemianowicz-Bąk 2012, Federowicz 2011, Marchlewski 2011, Swianiewicz 2012). However, the analyses hitherto were most of all focused on describing the differentiation by geographical factors and to some extent were they conducted in the framework of social policy theories. The analyses hitherto have also seldom applied formal methods of analysis of dependence between potential explanatory factors and the participation in pre-school education. As a result, the hitherto hypotheses on the causes of differences in the participation in pre-school education on the local level were fairly general and did not relate to the structured concept of conditions of this participation. They were by-and-large limited to seeking explanations in differences in the income of communes² (wealth of commune) and cultural factors, derived from the differences in types of communes and their location (e.g. urban/rural/suburban; communes in Eastern and Western Poland; cf. e. g. Swianiewicz 2012, Marchlewski 2011, Szlendak 2003). In the present paper, we analyse the differences in the use of pre-school education from the point of view of local social citizenship theory.³ Adopting this perspective means that to us, the level of participation in pre-school education reflects the level of entitlement to this type of education. Drawing on the concept created by T. Marshall (1950), the child's right to pre-school education shall be treated as a part of "social element of citizenship". The share of children aged 3 to 5 in a particular

¹ M. Theiss, PhD., "Local social citizenship in social policy: the example of care services for children under 5", funded within the NCN (SONATA) grant, contract no.: 2011/03/D/HS5/02498.

² A commune is the principal unit of three-stage administrative division of Poland at its lowest uniform level. In accordance with the principle of subsidiarity, each commune performs public tasks in its territory, for the benefit of its residents, c.f. Act on Gmina Self-government, dated 8.3.1990 (Journal of Laws 2001, 2001 No. 142, item 1591 with later amendments).

³ More on the concept of local social citizenship: M. Theiss, in the volume herein. Here, we would only like to note that the said concept considers differences and inequalities in using social social entitlements, including services in particular, on a local level.

commune attending pre-school is therefore to us a sign of social citizenship, thus, to what extent local social policy supports its residents in the use of social services.

In accordance with the Marshallian tradition of research, we consider social citizenship most of all a political phenomenon. This means that our research on conditions of pre-school education constitutes a part of a wider trend, which may be collectively tagged as “politics matter”. Among numerous policy explanations, it also includes concepts on the role of: social mobilisation (Korpi 83), political affiliation of local authorities (commune council and/or the executive branch) (Boyne, Hoggart), political participation of the habitants (Putnam), or local democracy, which the authors set as the reason for the differences in *policy performance* of local self-governments, including, among others, services for families and children. The latter trend collectively points to the importance of political factors, such as the institutional structure of local self-government and its links to regional and central institutions in the country, as well as party membership of the local elite and the patterns of political rivalry in a given local community (c f. e. g. Lankina, Hudalla and Wolmann 2008; Rossteutscher 2005).

In the present paper, we ask the question on the relationship between the active citizenship of the residents, that is, the so-called “active dimension of citizenship” (Turner, Stoker) and its “passive”, “social” dimension (Heywood). Active citizenship, possibly resulting in greater accessibility to pre-school education, is expressed with the turnout in parliamentary elections, as well as with saturation of the communes with non-governmental organisations, whereby, as described further, the choice of indices is partially prompted by their accessibility on the level of communes. In the present paper, we demonstrate that the difference in political activity of the residents of communes, measured by local turnout (in parliamentary elections) is correlated to the level of fulfilment of pre-school education entitlement to a much higher extent than the differences between the commune’s own *per capita* income (which reflects the financial means of a commune in enabling its residents with pre-school education). The present paper demonstrates the results of initial quantitative analyses, assumed as the basis for further qualitative research within the “Local social citizenship in social policy: the example of care services for children under 5” research project.

The study described in the present paper comprised all communes⁴ and cities with poviats rights in the central region of Poland, the Masovian voivodship, including the country’s capital - Warsaw. This voivodship varies greatly in economic development and as a result, in the level of wealth of the residents of particular communes and cities with poviats rights. Data sources:

- 1) Local Data Bank (Central Statistical Office) - for reference in population sizes in communes according to yearbooks (as of 2013) and contextual data on labour market trends in a particular commune,

⁴ The Masovian voivodship comprises 314 communes (including 35 urban communes, 50 urban-rural communes and 229 rural communes, as well as 5 cities with poviats rights).

- 2) Education Information System (EIS) - for reference in the number of pre-primary education establishments, their types, their governing authorities and the number of children attending various types of pre-primary education establishments and the time spent by children in these establishments.
- 3) The National Electoral Commission for reference in variables on voter turnout⁵.

In the first chapter of this article, we describe the historical and legal context of the layout of pre-primary education in Poland. Secondly (in Part 2) we demonstrate the differences in the participation in pre-primary education (provided by nursery schools, pre-primary education groups and pre-primary sections of primary schools) in the communes in Masovian voivodeship. The analyses takes into account the level of participation in part-time and full-time pre-primary education (children spending up to 5 hours, and over 5 hours in the establishment, respectively), also singling out the age group of 5-year-olds (subject to compulsory pre-primary education in accordance with the Act on the Education System, article 14, item 3; Journal of Laws 2004, No. 256, item 2572 with later amendments), also taking into account the division into public/non-public establishments. In the third part, we demonstrate that it is of vital importance to analyse the difference factors in fulfilling the entitlement to pre-primary education taking into account the possible reasons for different demand for these services. We have also shown the initial results of dependencies between (a) the commune's own income and (b) political activity and active citizenship of the residents of the commune and the level of fulfilling the entitlement to pre-primary care on the local level, within two groups with uniform demand for those services.

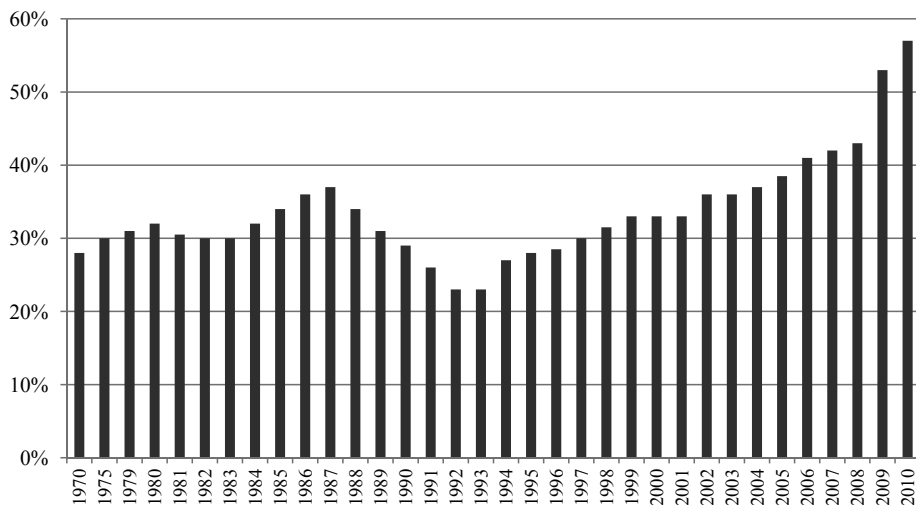
The historical and legal context of the scheme of pre-primary education in Poland

The political transition in Poland has left a strong mark on the scheme of pre-primary education. Until 1989, care establishments for children were maintained by local government authorities⁶, state-or cooperative-owned employment establishments, state-approved social organizations and some ministries. The level of participation in pre-primary education, measured with the percentage of children aged 3-5, attending pre-primary education institutions between 1970 and 1988 oscillated between 28 and 37% (Figure 1).

⁵ We would like to thank the Masovian Education Superintendent and "Moja Polis" website (www.mojapolis.pl) for enabling access to data in points 2 and 3.

⁶ Public administration is a set of actions, proceedings and undertakings (managerial and executive), undertaken for public interest by various entities, organs and institutions pursuant to the Act and within the legal framework; its organs comprise bodies and persons on state- and self-governmental level. Until 1989, local government duties were performed by the National Councils, dependent on the state authorities and implementing their policy on the local level, cf. Izdebski H., M. Kulesza (2004).

Figure 1. Level of enrolment in pre-primary education establishments in the age-group 3-5, 1970 – 2010.



Source: own work, based on Federowicz 2011:40.

Source: own work, based on Federowicz 2011:40.

The political and economic transition in 1989 resulted in, among others, an increase in unemployment rate among women, fewer financial resources allocated to cover the high costs of operation for many education and care establishments, and a different approach to their to-date social functions. As a result, many pre-primary care establishments were liquidated, especially in rural areas (Marchlewski 2011:13), which still results in large inter-communal differences in the access to care establishments. The Act of 8 March 1990 on Commune Self-Government moved the responsibility for public education onto the local self-government (maintaining nursery schools and other schools are the so-called “the commune’s own tasks”. Local self-government entities are most of all bound to, among others, to individually establish the network of public nursery schools, organize and promote pre-primary education (Article 5, item 5; Journal of Laws 2004, No. 256, item 2572 with later amendments, cf. Also Dziemianowicz - Bąk, Bochno 2012: 7). The accession to the EU in 2004 pronounced the poor state of pre-primary care in Poland: when compared to other countries, Poland had, and still has, a considerably lower rate of participation in pre-primary education by children aged 3-5. The current EU strategy (Europe 2020) sets the minimal benchmark of participation in early childhood education at at least 95% of children between the age of four and up. It was reflected in an obligatory one-year pre-primary school preparation period in nursery schools, pre-primary sections of primary schools or other forms of pre-primary education introduced in Poland in 2011 (from 2009, it was a right of the citizens) and applicable to children aged 5 (Article 14, item 3; Journal of Laws 2004, No. 256, item 2572 with later amendments;cf. also

Federowicz 2011:42). Another action to increase the availability of pre-primary services was the implementation of new forms of pre-primary education: pre-primary education groups and pre-primary points by the Ordinance of the Minister of National Education in 2010.⁷ These establishments operate on the basis of fewer hours a day than nursery schools, but operate on the same core curriculum. Establishing these institutions contributed to the rise of the level of use of childcare services for children under 5, especially in rural areas, where the percentage in question has risen from less than 30% to over 50% in the period from 2009 to 2012. On average, 72% percent of children aged 3-5 were subject to pre-primary education in the last school year.

The differences in participation in pre-school education on the local level in Poland

The conditions briefly sketched out above contribute to the ongoing strong spatial differences in increasing participation in pre-primary education on the level of communes. The current analyses (*Justification...* 2012, p. 3, also cf. Swianiewicz 2013, p. 13 ff.) demonstrate difference between rural areas (where 52.1% of children aged 3-5 were attending pre-primary education establishments in the year 2011/2012) and urban areas (where the respective ratio amounts to 86.3%), while both categories are highly varied internally. Thus, the level of participation in pre-primary education in the largest cities, which form The Union of Polish Metropolises is 91%, while in the remaining cities with poviats rights, it amounts to 81%. So as to rural communes, the current state is different in post-State Agricultural Farm communes, where the percentage of children attending nursery schools or other pre-primary education institutions does not reach 50%, and in post-industrial communes, where just over 60% of children are subject to pre-primary education (Swianiewicz 2012:19).⁸

There are strong differences in, among others, the level of participation in pre-primary education for over 5 hours a day (under 5 hours, pre-primary education is generally free in public nursery schools⁹). In the smallest rural communes (up to 5,000

⁷ Cf. Ordinance of the Minister of National Education of 31 August 2010 on other forms of pre-school care, the conditions of establishing and organising these forms and their operation, Journal of Laws 2010, No. 161, item 1080.

⁸ The "post-State Agricultural Farm communes" are the communes which, in the People's Republic of Poland, were centred around the State Agricultural Farms (Polish: Państwowe Gospodarstwo Rolne, PGR, often abbreviated as "pegeer" in Polish): a specific form of ownership of agricultural land by the government. The closing down of the State Agricultural Farms in 1991-1993 led to a considerable reduction or a complete liquidation of workplaces and the accompanying educational establishments (nursery schools and schools) and disintegration of the social life. Apart from that, cutting the transport links between the communes and other centres made it highly difficult for the residents to adapt to the changed socio-economic situation.

⁹ In correspondence with Article 6 of the Act on the Education System, 5 hours a day in public nursery schools are assigned to the core curriculum and are free of charge. The com-

residents), half of children ages 3-5 attends any establishment of pre-primary education, and two-thirds of the children (66%) stay there up to 5 hours a day). Among rural communes, the latter figure significantly diminishes as the size of community increases, being generally lower urban-rural communes than in rural communes (cf. Table 1.). This remark is confirmed by analyses on how the children are provided with meals in pre-primary establishments: in rural areas, the prevailing group of children (49%) is provided with two meals, while in urban areas, the prevailing majority of children (74%) have three meals (Federowicz 2011:215).

Table 1. Level of participation of children ages 3-5 in pre-primary education in Poland and the percentage of nursery schoolchildren staying in communal nursery schools up to 5 hours, by type and size of self-governments (school year 2011/2012)

Commune type	Level of participation in pre-primary education for children ages 3-5	The percentage of children staying in communal nursery schools up to 5 hours among children attending communal nursery schools
Rural commune up to 5,000 residents	50%	66%
Rural commune over 5,000 - up to 7,000 residents	54%	63%
Rural commune over 7,000 residents	59%	56%
Rural-urban commune up to 5,000 residents	55%	53%
Urban-rural commune over 5,000 - up to 7,000 residents	60%	56%
Urban-rural commune over 12,000 residents	71%	43%
Urban commune up to 5,000 residents	76%	39%
Urban commune over 5,000 - up 22,000 residents	78%	29%
Urban commune over 22,000 residents	80%	26%
Cities with poviast rights, without 12 cities forming the Union of Polish Metropolises	81%	27%
Cities forming the Union of Polish Metropolises	91%	17%
Poland in total	72%	39%

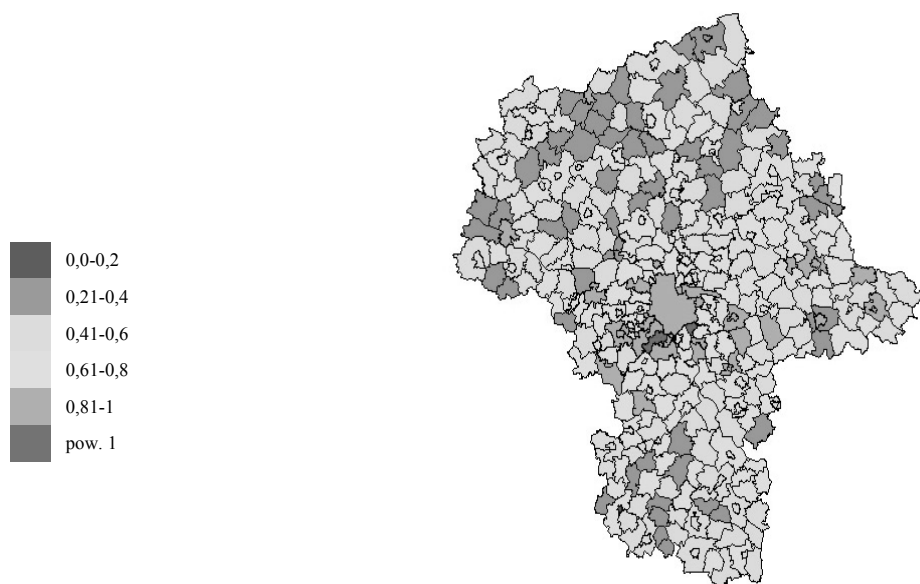
Source: The justification of the bill to amend the Education System Act and amending certain other acts, the Public Information Bulletin of the Ministry of National Education.

munes adopt charges for the 6th and the following hours of the child's stay in the nursery school. These charges differ in Poland, varying from PLN 0 to over PLN 3 per hour (Swianiewicz 2012: 110).

In the Masovian voivodship, which is the subject of latter analyses in this text, even larger discrepancies between communes can be observed. The span of the participation in pre-primary education indicator is nearly 100%, which means that in the communes where the phenomenon in question is the “weakest”, 20% of children are attending pre-primary education establishments (for example, Szydłowo) while attaining 117% in the “strongest” ones (Józefów). The indicator surpasses 100% when there are more children enrolled in the pre-primary education establishments in a given commune than the actual number of children of the appropriate age in a given commune. It probably means that the parents drive their pre-primary school-children from other (neighbouring) communes. This might be a result of a lack of appropriate accessibility to pre-primary education in the place of residence, but also of convenience for people working in a commune other than the one where they live. Another explanation is that some residents of a given commune are not actually registered for permanent residence there.

The highest level of participation in pre-primary education in the Masovian voivodship is observed in the suburban communes of Warsaw agglomeration and in the capital itself, yet also in other cities with powiat rights (e.g. Płock or Siedlce). The further from the central belt of the voivodship, the lower the average indicator value for communes, both when moving to the north and south of the analysed area (fig. 1). More importantly, no significantly lower value of the indicator was observed in the eastern part of the voivodship, considered a part of the so-called eastern wall, a poorer

Figure 1. Level of participation in pre-primary education in the Masovian voivodship

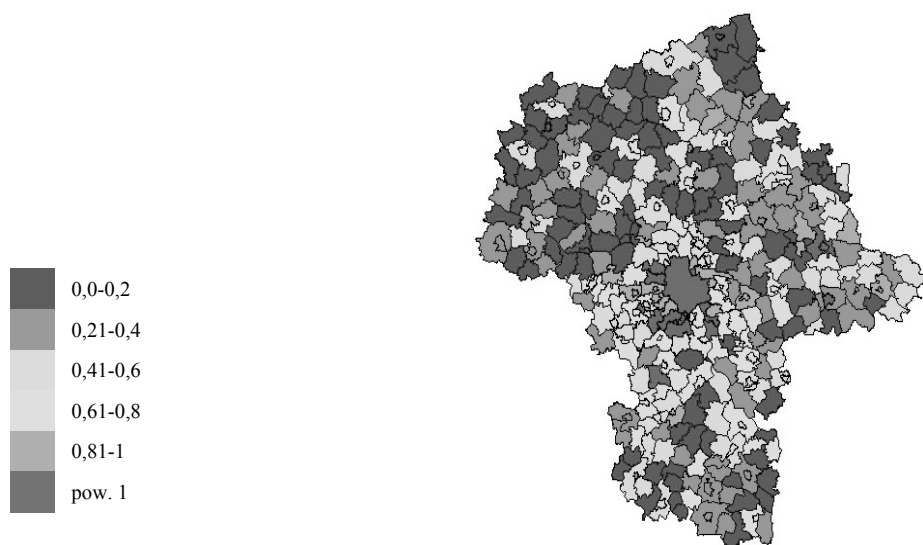


Source: own work, based on the CSO and EIS data.

region of Poland. Apart from a few communes adjoining Siedlce (which might be affected by the aforementioned phenomenon of driving children to establishments in neighbouring communes), the percentage of children attending pre-primary establishments is close to the one observed in communes close to Warsaw, including rural ones (for example, Mrozy).

Typically agricultural areas (Maków and Grójec poviats) visible on the map as yellow-orange parts in the respective northern and southern part of the voivodship, have a distinguishably lower level of participation in pre-primary education, especially its full-time services (Fig. 2). Employment in agriculture and probable access to informal care (multi-generational families) result in very low percentages of children staying in care establishments for over 5 hours. In many communes in the Masovian voivodship (28 out of 364 communes analysed), this percentage equals 0%, which means that all children attending nursery schools are collected after 5 hours maximum. For the second group of communes (121 communes, constituting 1/3 of all communes in the voivodship), with a prevalent number of rural communes, the indicator does not surpass 30%, with the median value at 42%. It is worth noting that rural communes located close to cities have their particularities. The average “full-time” participation in pre-primary education indicator in these communes attains nearly 50%. On the other hand, the result for Warsaw and its environs (Stare Babice, Milanówek, Żabki) surpass 100%. The level of fulfilment of pre-school education entitlement of over 5 hours is the strongest difference factor for communes in the Masovian voivodship.

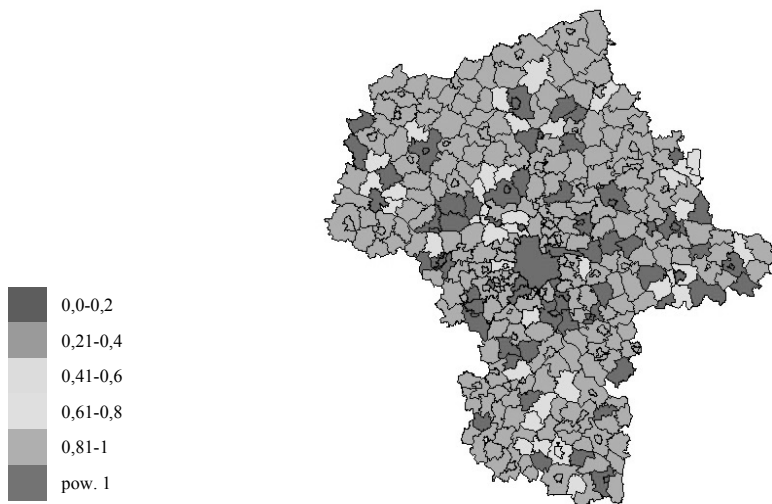
Figure 2. The share of children staying in pre-primary education establishments for over 5 hours a day in the Masovian voivodship



Source: own work, based on the CSO and EIS data.

The reasons for not fulfilling the entitlement to pre-primary education includes the side of supply, such as lack of establishments, and demand: parents' reluctance towards the forms of institutional care for children aged 3-5, or lack of need of such care thanks to access to informal types of care (help from family members, in particular, the child's grandmother; cf. Marchlewski 2011: 27, Swianiewicz 2012: 30). However, since 2011, both communes (ie. school headmasters as their representatives) and parents are obliged to provide an obligatory 1 year pre-primary education to children at the age of 5, so the child attends a nursery school (or a pre-school section of a school, the so-called "zero grade") before starting primary school. Despite the statutory obligation, in 288 communes out of 365 researched ones, the percentage is lower than 100% (Fig. 3). The indicator reaches the lowest values in the southern part of the studied area (Jedlińsk, Przyłęk, Rzecznów), and the highest values - in Warsaw and its surroundings. The differences in participation in pre-primary care are the smallest for this indicator: for rural communes, the average is approx. 90%, higher than in rural, suburban communes (84%), which is an exception. Although it might be supposed that these values are the result of children attending nursery schools outside their place of residence, as well as of the shortages in local data, the indicator values on the 50%-70% level (in 15 communes) suggest that in certain communes in Masovia, the pre-primary school preparation obligation is not fulfilled completely.

Figure 3. Level of participation in pre-primary education for children aged 5 in the Masovian voivodship

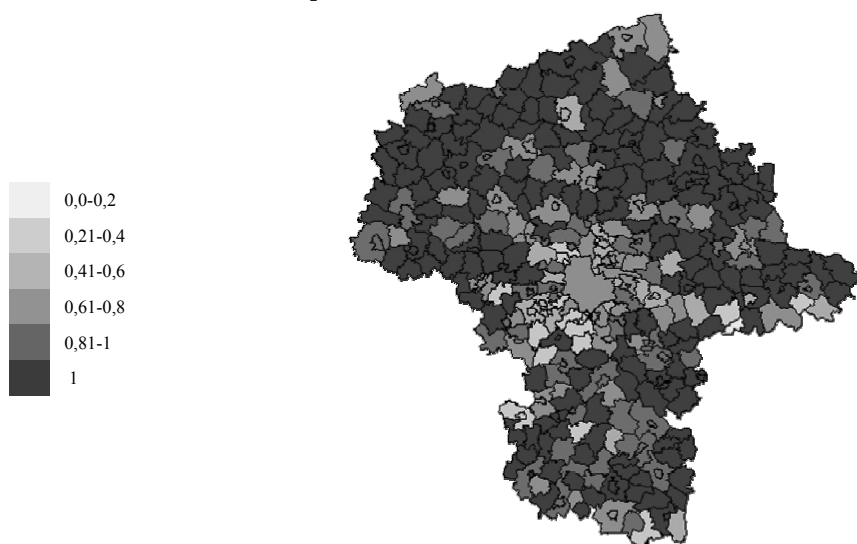


Source: own work, based on the CSO and EIS data.

The distribution of the public establishment ratio (measured as the ratio of the number of children in public establishments to the number of children in all estab-

lishments) in the fulfilment of the entitlement to pre-primary education for children ages 3-5 shows correlations reverse to those described above (Fig. 4). For urban communes in Masovia, this indicator amounts to just over 70%, while attaining over 90% for rural communes (excluding communes bordering cities). It demonstrates that in rural areas, where the percentage of children attending pre-primary education is lower, this education is provided almost exclusively by public (state-funded) establishments. In larger settlements, where the degree of fulfilling the entitlement to pre-primary education is higher, the share of private providers in fulfilling this entitlement is also larger. It is most of all visible in sub-Warsaw communes, where the level of participation in pre-primary education exceeds 100%, the share of public establishments is 30-50%: for example, it is at 29% in Lesznowola, at 40% in Ząbki and at 44% in Nadarzyn). Thus, it must be observed that the higher level of fulfilling the entitlement to pre-primary care is attained, in some communes, most of all thanks to completing what public establishments have to offer with non-public forms of pre-primary education.

Figure 4. The percentage of public establishments in providing pre-primary education in the Masovian voivodship



Source: own work, based on the CSO and EIS data.

In conclusion, the differences in fulfilling the entitlement to pre-primary education in the Masovian voivodship are large, as in the entire country; the highest differences are observed in fulfilling the entitlement to full-time pre-primary education, that is, for over 5 hours, while the smallest differences are observed in participation in pre-primary education of 5-year-olds. Significant differences according to commune type (urban/rural and a separate category of rural suburban communes) have proven

significant, as has been demonstrated by other researchers of this subject (Balcerzak-Paradowska 2007, Swianiewicz 2012). The particular case of suburban rural communes has been confirmed. What is more, the large level of contribution to high level of fulfilling the entitlement to pre-primary education by non-public establishments has also been observed. The conditions that differentiate the level of participation in pre-school education are subject to further analysis in the following part of the article.

Conditions of fulfilling the entitlement to pre-primary education

In accordance with the accepted theoretical assumptions, in the present study, we propose a hypothesis of the role of political conditions in fulfilling the entitlement to pre-primary education in particular communes. We are particularly interested in the factors related to civic engagement as potentially increasing the impact of the residents on the scope and quality of local social services. However, it must be stated that this approach to analysing the conditioning of pre-primary education poses a certain methodological problem. On one hand, the subject of our research is the local social policy considered from the point of view of social citizenship, thus, we assume that the commune is implementing its autonomous, explicitly or implicitly, “pre-primary policy” (at least in terms of access to pre-primary education services for children under the age of 5), expressed, among others, in its decisions on the network of nursery schools, resolutions on nursery school fees, the level of subsidizing nursery schools, etc., resulting in a particular possibility of fulfilling the social entitlement to this type of services. On the other hand, publications of the topic give a full picture of the correlation between the demand for pre-primary services and the level of participation in pre-primary education. For example, Swianiewicz demonstrated that in many communes in Poland with a low level of pre-primary school attendance, there is no problem of the lack of places in nursery schools. More often, it is the parents who, due to cultural and economic factors, do not show a considerable interest in these services, however, this interest has been rising recently (Swianiewicz 2013: 30).

In the analysis of conditions of the level of use of pre-primary education entitlements, the combination of the aforementioned factors is, for us, a signal to make a distinction between supply and demand factors. The demand factors are those that determine the volume of places required in pre-primary education establishments, that is, labour market condition, including the level of employment/unemployment, especially among women, access to informal care (especially support from the child’s grandparents) and a broadly understood cultural context, including beliefs and child-rearing practices for children aged 3-5 that are dominant in a particular community. We should expect that in rural communes not neighbouring a city, with a lower employment rate for women, higher level of unemployment, higher access to informal care (more multi-generational families living in a single household) and more traditional beliefs as to who should take care of a small child, the demand for pre-primary care services might be lower than in urban communes or in rural suburban communes.

The main supply indicator, used both by researchers and policy-makers (local and government-level politicians), is the level of wealth of a commune (Marchlewski 2011: 32, *Ocena skutków...*, p. 5). The measure of assessing the level of wealth of a commune are the commune's own revenues *per capita*, funding, among others, pre-primary education establishments. The public discussion on the availability of nursery schools on the local level often cites the argument that less wealthy communes simply cannot afford to build and maintain pre-primary care establishments¹⁰. Previous studies have highlighted the increase in the use of pre-primary education, proportionate to the level of wealth of a commune (Herczyński 2012:99). Analysing the correlation between the level of the commune's own income *per capita* and the level of participation in pre-primary education among children ages 3-5 in the Masovian voivodship, with the database used in the present study demonstrates a moderate linear correlation between these variables ($r=0.55$). However, it must be noted that there might be a positive correlation between the commune's level of wealth (own income *per capita*) with labour market conditions (more women working) and, in consequence, the availability of informal institutional care, that is, the demand factors. The observed positive correlation between the commune's income and participation in pre-primary education may be due largely to the influence of the demand-, and not supply factors.

To stop the interfering influence of intercurrent high (low) commune income *per capita* and high (low) demand, the further analysis only includes two sub-samples of communes in the Masovian voivodship, which, after adopting the aforementioned theoretical assumptions and indices, are a set of communes with a potentially internally¹¹ homogeneous level of demand for pre-primary education services: extremely low (first group) and extremely high (second group). The first group accommodated 31 urban communes (over 1/3 of all urban communes in the voivodship), with a relatively low percentage of the unemployed in working age population, not exceeding 11% (therefore, with a relatively good employment market conditions)¹². The second group featured 33 rural communes (approx. 1/7 of all rural communes in the voivodship), with a relatively high percentage of the unemployed in working age population (over 14%, therefore, with relatively worse employment market conditions). The sampling process thus ensured the homogeneous labour market conditions (unemployment

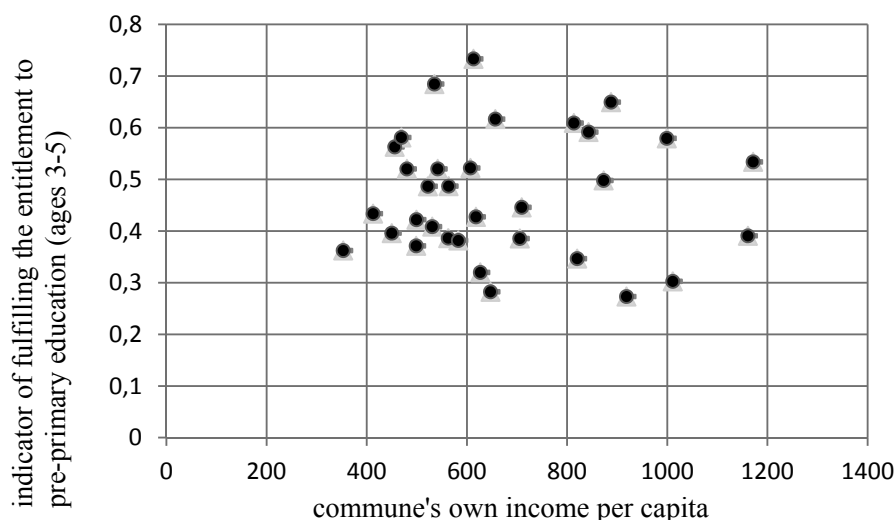
¹⁰ These were the questions raised in, among others, in the citizens' initiative "Przedszkole dla każdego" ("Nursery School for Everyone") from the Union of Polish Teachers, the official position of the Union of Rural Communes of the Republic of Poland, the self-government portal (www.portalsamorzadowy.pl), or the call of the City Council of Łañcut on altering the principles of financing nursery schools of December 11, 2012, supported by numerous communes.

¹¹ The category of potentiality should be underlined here. Of course, a stronger inclusion of, among others, cultural differences between particular communes would portray the demand for pre-primary education in much more detail.

¹² Unfortunately, no data is available on unemployment level on the level of communes. More detailed information on the communes chosen for the analysis are included in the Annex to this article.

level), level of potential access to informal care by family and cultural context (rural vs. urban areas). For each group, we analysed the linear correlation (the Pearson product-moment correlation coefficient and the statistical significance, based on Student's t-test. It appeared that after limiting the impairing influence of demand factors – namely – for the analysis conducted separately in two aforementioned subsamples, the relationship between own income of communes per capita and the level of fulfilling the entitlement to pre-school education pre-primary care dissipates in both commune groups (it is not linear or curvilinear; see Figures 2 and 3 and Table 2).

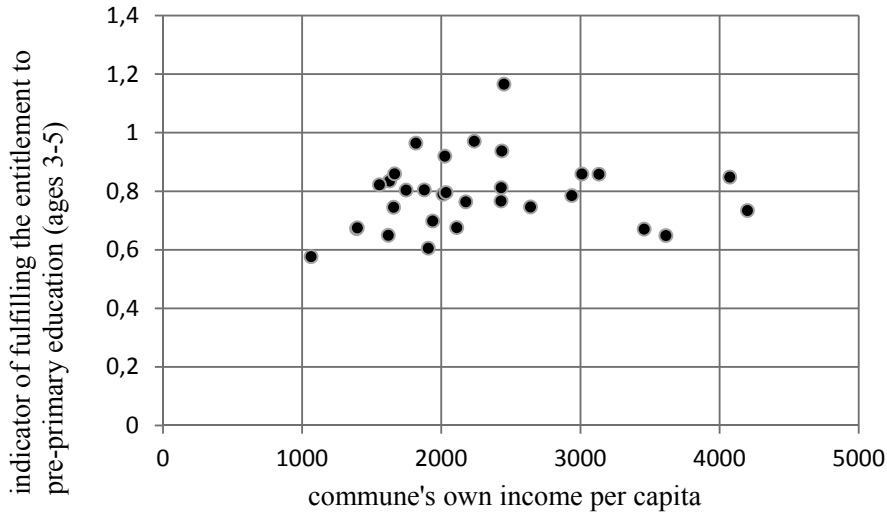
Figure 2. Two-dimensional distribution of own income per capita and the indicator of fulfilling the entitlement to pre-primary education for children aged 3-5 in rural communes.



Source: own work. Pearson product-moment correlation coefficient: $r = 0.112$, no statistical significance.

If the differences in own incomes of the communes does not explain the differentiation in the level of participation in pre-primary education within groups of communes standardized according to demand factors in a significant way, the question becomes what can explain those differences. As mentioned before, by developing the concept of local social citizenship, we hypothesize that one of the significant determinants of the execution of the civil rights is political activity of the commune residents (Turner, Stoker). In order to initially verify this hypothesis, we conducted an analysis of correlation between the level of attendance in pre-primary education within the two aforementioned specific groups of communes and three indices of civic participation of residents: 1) participation (turnout) of commune residents in parliamentary elections (in the year 2010); 2) participation of residents of a commune in self-government elections (in year 2010) and 3) number of NGOs per 10 thousand residents.

Figure 3. Two-dimensional distribution of own income per capita and the indicator of fulfilling the entitlement to pre-primary education for children aged 3-5 in rural communes.



Source: own work. Pearson product-moment correlation coefficient: $r = -0.003$, no statistical significance)

Table 2. Pearson product-moment correlation coefficients between the studied variables and the enrolment rate at the age of 3-5 by commune classes

Commune group	Own income <i>per capita</i>	Parliamen- tary voter turnout	Self-govern- ment voter turnout	Number of NGOs per 10 thousand residents
Urban communes with low unemployment rate	0.112	0.466***	0.097	0.255
Rural communes with high unemployment rate	-0.003	0.421**	0.018	0.017

Source: own work. Significance level symbols: *** $\alpha=0.01$; ** $\alpha=0.02$;

* $\alpha=0.05$

The first indicator (attendance in parliamentary election) reflects, first and foremost, the aspects of the residents' activities related to socio-cultural capital in a given community and civic attitudes, based on civic skills and engagement in the public sphere (Nie, Powell, Prewitt 1969, Brady & Verba 1995). It is in case of this indicator that we should expect a positive correlation with the level of participation in pre-primary education. The voter turnout in self-government elections rather

reflects the power of local community relations and is negatively correlated with the size of commune and therefore is significantly higher in smaller communes, where politically active people are well known in a given community (Nie, Powell, Prewitt 1969). It should also be underlined that the levels of voter turnout in parliamentary elections and voter turnout in self-government elections are not correlated, which confirm the thesis that they concern different aspects (including reasons) of political activism of the residents. The third indicator, which is the number of NGOs per number of residents, is a classic indicator of local “civic” social capital (Putnam 1995, Swianiewicz). Due to diversity of non-government organisation types it includes (both local grass root-type organisations, heavily rooted in community and professional organisations operating at a larger scale), it is difficult to find its precise interpretation, however, it is assumed that it informs on the level of self-organisation of a local community (Chaskin, Lewenstein). The outcomes of correlation analysis are presented in Table 2.

According to our hypothesis, there is a positive, moderately strong and statistically significant correlation between parliamentary voter turnout and the level of participation in pre-primary education, both in the set of urban communes of low unemployment level (namely communes with a potentially high demand for pre-primary services) and in rural communes of high unemployment level (namely communes with a potentially low level of demand for pre-primary services). Therefore, the higher the voter turnout in parliamentary elections in a commune, the higher the level of fulfilling the entitlement to pre-primary education for children aged 3-5. In case of the two other indices: attendance in self-government elections and a saturation of NGOs, the Pearson linear correlation coefficients are not statistically significant. On the basis of this result, we can assume that the level of fulfilling the entitlement to pre-primary education is higher where the level of civic participation is higher, however, only the activity which is based on individual attitudes and commitment of individuals, rather than the one based on the power of local relations. In the next part of the study performed within the project of M. Theiss, Ph. D., entitled “Local social citizenship in social policy: the example of care services for children under 5”, the question of the meaning (influence) of civic participation in fulfilling the entitlement to pre-primary education will be examined in qualitative studies conducted in the chosen communes of Mazovian voivodship.

Conclusion

This text described the phenomenon of the differences in the participation in pre-primary education on the local level in Mazovian voivodship. The level of participation in pre-school education reflects the level of fulfilling the entitlement to this type of education, an entitlement that is an ingredient of the “social element of citizenship”. In accordance with T. Marshall, social citizenship was treated as a political phenomenon, presenting the hypothesis of local, political conditions of social

citizenship, particularly those connected to different forms of political participation of residents. In this paper, we demonstrated that - when controlling the factors influencing demand for pre-primary education services – the difference in political activity of the residents of communes, measured by local turnout (in parliamentary elections) is correlated to the level of fulfilment of pre-school education entitlement to a much higher extent than the differences between the commune's own *per capita* income (which reflects the financial means of a commune in enabling its residents with pre-school education).

This main conclusion, significant in terms of studies conducted until now, surely needs deepening. Nonetheless, it is a fact that when limiting the influence of demand variables on the difference in the level of participation in pre-primary education, the affluence of a commune loses its key role in explaining differences in fulfilling the entitlement to pre-primary education. It has consequences not only for social policy in practice, but also for its theoretical foundations. The proposed legislative changes aiming at providing new financing sources for pre-primary educational centres development will be insufficient for growth in participation in pre-primary education. The perspective of citizens, their cultural capital, competences, attitudes and engagement in fulfilling the entitlement for services becomes more and more crucial.

References

- Balcerzak-Paradowska, B. (2007), *Ocena systemu opieki instytucjonalnej nad małym dzieckiem w Polsce w aspekcie umożliwienia godzenia obowiązków zawodowych z rodzinnymi*. in: *System instytucjonalnej opieki nad dzieckiem*, C. Sadowska-Snarska (ed.), WSE w Białymstoku, Białystok.
- Brady, H., Verba, S., Schlozman, K. (1995), *Beyond SES: A Resource Model of Political Participation*. "The American Political Science Review", Vol. 89, No. 2.
- Dziemianowicz – Bąk A., Bochno I. (2012), *Gminy wobec wyzwań oświatowych – przykłady strategicznych działań samorządów w zakresie edukacji*, Warszawa.
- Federowicz M. (2011), *Spółeczeństwo w drodze do wiedzy. Raport o stanie edukacji 2010*, Warszawa.
- Herczyński J. (2012), *Wskaźniki oświatowe*, Biblioteczka Oświaty Samorządowej, Warszawa.
- Izdebski H., M. Kulesza (2004), *Administracja publiczna, zagadnienia ogólne*, 3rd edition, Warszawa.
- Lankina T.V., Hudalla A., Wollmann H. (2009), *Local Governance in Central and Eastern Europe: Comparing Performance in the Czech Republic, Hungary, Poland and Russia*, Palgrave McMillan, Basingstoke.
- Marchlewski W. (2011), *Organizacja wychowania przedszkolnego na terenach wiejskich*, Warszawa.
- Marshall T H. (1950), *Citizenship and Social Class: And Other Essays*. Cambridge, University Press.

- Nie, N., Powell, G., Prewitt, K. (1969), *Social Structure and Political Participation: Developmental Relationships*, Part I. "The American Political Science Review", vol. 63, No. 2.
- Nyczaj-Drag M. (2009), *Osiągnięcia szkolne uczniów w kontekście kapitału społecznego rodziny. Analiza porównawcza dwóch równoległych klas pierwszych szkoły podstawowej*, in: *Idee – diagnozy – nadzieje – szkoła polska a idee równości. Szkice teoretyczne i studia empiryczne*, Męczkowska-Christiansen A., P. Mickiewicz (ed.), Wrocław, Wydawnictwa Naukowe Dolnośląskiej Szkoły Wyższej.
- Assessment of results of the regulation of the Bill of. 19.12.2012 r. to the Act on Amending the Act on Education System and Certain Other Acts, all documents available on the Ministry of the National Education's official website: <http://www.men.gov.pl> [retrieved May 28, 2013].
- Piowowski R. (ed.,) (2007), *Dziecko. Sukcesy i porażki*, Warsaw, Instytut Badań Edukacyjnych, 2007.
- Rossteutscher S. (ed.) (2005), *Democracy and the Role of Associations: Political, Organizational and Social Contexts*, Routledge.
- Ordinance of the Minister of National Education of 31 August 2010 on other forms of pre-school care, the conditions of establishing and organising these forms and their operation, Journal of Laws 2010, No. 161, item 1080.
- Szlendak T. (ed.) (2006), *Małe dziecko w Polsce. Raport o sytuacji edukacji elementarnej*, Warszawa.
- Szlendak T. (2003), *Zaniedbana piaskownica*. ISP, Warszawa.
- Swianiewicz P., M. Herbst, W. Marchlewski (2005), *Finansowanie i realizowanie zadań oświatowych na obszarach wiejskich*, Warszawa.
- Swianiewicz P. (ed.) (2012), *Edukacja przedszkolna. Polityka samorządów gminnych w zakresie edukacji przedszkolnej*, ORE, Warszawa.
- Act on the Education System, article 14, item 3; Journal of Laws 2004, No. 256, item 2572, with later amendments
- The justification of the bill on amending the Act on the Education System and other Acts, of November 19, 2012 (2012), The Ministry of National Education, www.men.gov.pl, retrieved March 15, 2013
- Verba, S., Nie, N. (1972), *Participation in America. Political Democracy and Social Equality*. Chicago, London: University of Chicago Press
- Zahorska M., M. Żyto (red.), (2004), *Małe dziecko w systemie opieki społecznej i edukacji*, Instytut Spraw Publicznych, Warszawa.

Streszczenie

W niniejszym tekście analizujemy zjawisko zróżnicowania korzystania z edukacji przedszkolnej z perspektywy koncepcji lokalnego obywatelstwa społecznego. Przyjęcie tej perspektywy oznacza, że poziom upowszechnienia edukacji przedszkolnej jest dla nas odzwierciedleniem poziomu realizacji uprawnienia do tej edukacji - składnika

„społecznego elementu obywatelstwa”. Obywatelstwo społeczne, zgodnie z tradycją Marshallowską, traktujemy jako przede wszystkim fenomen polityczny. Uwzględniamy gospodarcze uwarunkowania lokalnej polityki społecznej w zakresie edukacji przedszkolnej, jednak uwagę koncentrujemy na lokalnych, politycznych uwarunkowaniach obywatelstwa społecznego, w tym szczególnie tych, które są związane z różnymi formami partycypacji politycznej mieszkańców. W niniejszym artykule pokazujemy, że zróżnicowanie aktywności politycznej mieszkańców gmin, mierzone lokalną frekwencją wyborczą (w wyborach parlamentarnych), w znacznie większym stopniu niż zróżnicowanie w dochodach gminy *per capita* jest powiązane z różnicami w poziomie realizacji uprawnienia do edukacji przedszkolnej.

Słowa kluczowe: lokalne obywatelstwo społeczne, upowszechnienie edukacji przedszkolnej, partycypacja polityczna¹³

¹³ Do elektronicznej wersji artykułu, dostępnej na stronie internetowej www.problemyps.pl, dołączony został aneks zawierający szczegółowe informacje o badanych gminach z woj. mazowieckiego (m.in. liczba mieszkańców, liczba dzieci w wieku 3-5 lat, liczba organizacji pozarządowych na 1000 mieszkańców)

Ewa Duda-Mikulin

University of Salford

***Migration as opportunity? A case study
of Polish women: migrants in the UK
and returnees in Poland***

Summary

Migration from the new European Union (EU) Member States to the United Kingdom (UK) has been identified as one of the most significant social phenomena of recent times and has been studied extensively, particularly since 2004. Although gendered studies of migration are now gaining recognition, there is limited literature in relation to Polish women. There is now much evidence to support the view that migrant women constitute a large proportion of international migrants; within the European context, migrant women already outnumber their male counterparts.

Drawing on a review of secondary literature and preliminary findings from new qualitative research undertaken in Poland and the UK, this paper explores how Polish migrant women negotiate their lives in regard to work and welfare responsibilities when exercising their rights as EU citizens. It is argued that migrant women should be seen as active decision makers and that migration may be considered as an opportunity to bring about change in relation to gender roles. It is concluded that migration presents an opportunity to re-evaluate gender norms.

Key words: gender roles, migrant women, Poland, UK, welfare

Introduction

It can be argued that in the last two decades, immigrant communities and as a result, the characteristics of diversity in Britain have changed considerably (Vertovec, 2007). Since the 1990s, there has been a rise in net immigration recorded with a greater variety of countries of origin. As a consequence, new immigration laws have been designed (e.g. the Asylum and Immigration Acts of 1993, 1996, 1999; the Borders, Citizenship and Immigration Act 2009). There has been a rapid increase of different immigration statuses and migration channels. For labour migrants, the UK remained an attractive destination for most of this time due to the relatively low unemployment rate, labour shortages and generally high economic performance (Ryan, *et al.*, 2009). There has been increasing multilingualism, religious diversity and a vast variety of different categories of immigrants (i.e. migrant workers, international students, family joiners, asylum seekers, etc.), where the type of migratory movement determines their legal status and what comes with it, their eligibility to make use of public services and resources which then has an impact on their likelihood to stay or re-emigrate. Noteworthy is the fact that “over the past thirty years, more females than males migrated to the UK” (Vertovec, 2007, p. 1040).

The classic theories of migration may have become redundant in light of contemporary international migratory movements (Morokvasic, 2004). It could be asserted that there is no single consistent theory of international migration but rather a group of theories developed independently from each other (Massey, *et al.*, 1993) and their usefulness is contingent on what is being studied. Arguably, classic migration theories do not adequately account for the experiences of women. Gendered theories of migration build on these earlier theories adding a new dimension to understanding migration (Ryan & Webster, 2008). The majority of classic migration theories recognise and focus on economic imperatives as the predominant reasons for migratory decisions. It could, however, be that in the ‘age of migration’ (Castles & Miller, 2009) people decide to migrate out of curiosity or simply because they can (Kindler & Napierała, 2010). When considering migration theories, it is important to distinguish economically motivated and forced migratory movements (Castles & Miller, 2009). The former is the focus of this research project and refers to those who decide to migrate to improve their economic situation. It is noteworthy that the classic migration theories do not account for actors’ ‘agency’, they focus very much on the rational decision making thus do not illuminate people’s lived experiences of migration which is an important part of this research.

This paper presents a review of literature relevant to Polish migration to the UK and gender. The following section outlines A8 and particularly recent Polish migration to the UK. Then the concept of gendered migration is explained. A section on methodology provides an explanation of the chosen philosophical framework, methods of data collection and sample composition. After that the idea of migration as an opportunity is introduced. The paper is concluded with some emerging themes from early analysis.

Polish migration to the UK

Accession 8¹ (A8) migration to the UK has been studied extensively, particularly since 2004 and the European Union expansion (Slany, 2008; Grabowska-Lusińska & Okólski, 2008; Drinkwater, Eade & Garapich, 2006). In fact, migration from these new EU member states to the UK has been named one of the most significant social phenomena of recent times (Pollard, Latorre & Sriskandarajah, 2008). There have been a number of studies focusing on migrant workers from the new A8 countries (Cook, Dwyer & Waite, 2011; Scullion & Morris, 2010). In recent years, there has also been much press coverage on A8 immigration to the UK, particularly from Poland (Bakalar, 2013; Pidd, 2011; Ramesh, 2010).

However, gender and gender roles, in particular in relation to A8 migration and CEE welfare states, remain an under-researched area (Pascall & Kwak, 2005). For the purpose of this paper, gender is seen as something subjected to the expectations from the surrounding social structure (e.g. culture, tradition, religion, society) in respect of behaviour, certain qualities or lack thereof that are associated with that particular gender (Cooke, 2011, p. 26).

“Gender denotes an unequal and largely hierarchical division between women and men, which is embedded in social practices and institutions. (...) Gender is embodied and lived through everyday interactions and, although it is characterised by the endurance of inequalities such as patriarchy, it is also subject to change and is a fluid concept, which can be negotiated and transformed as well as reinstated” (Woodward, 2011, p. 4).

Post 2004 EU enlargement, the UK proved to be the most popular destination country for Polish migrants (CBOS, 2006). The post-accession migration was “the largest ever wave of immigration to the UK” (Drinkwater, Eade & Garapich, 2006, p. 2). It was estimated that between one and two million Polish nationals left Poland for the West (Isański & Luczys, 2011). The majority of post-accession migrants to the UK were Polish nationals (Trevena, 2009); hence the Polish community is the most rapidly growing migrant community in contemporary Britain (Isański & Luczys, 2011). That is not to say that Polish migration to the UK is a new phenomenon. In fact, previous waves of Polish migration to the UK can be traced back to the 16th century (cf. Trevena, 2009). However, it was not until the EU enlargement in 2004 that the idealised stereotype of a Polish migrant worker was coined. It points to a hard-working, educated, compliant worker, who makes few demands on welfare services in the UK (Drummond & Judd, 2011). Among those who registered²,

¹ The term Accession 8 (A8) countries refers to the eight former Eastern Bloc states in Central and Eastern Europe (CEE) that joined the European Union on the 1st May 2004.

² Post 2004 all A8 migrants to the UK were obliged to register under the government Worker Registration Scheme (WRS), this was part of the transitional arrangements and ended on the 1st May 2011.

there was a slight gender imbalance (Drinkwater, Eade & Garapich, 2006), but it is presumed that women were under-represented due to moving as partners and possibly not taking up work immediately after arrival (Ryan, *et al.*, 2009). In regard to women, it has been noted that migration may be a way to escape from the Polish patriarchal society (Kindler & Napierała, 2010). The analysis of discussions on internet forums confirmed the fact that Polish women see their emigration to the UK as an opportunity to 'leave behind' traditional gender roles (Siara, 2009). Despite this, the majority of Polish research does not take into account gender as an important factor determining migratory decisions (Kindler & Napierała, 2010).

Gendered migration

Arguably, migration is gendered (Caritas, 2011; Ryan & Webster, 2008; Kofman, 2004; Pessar & Mahler, 2003). Although women play a crucial role in contemporary migrations, previously they have been "sociologically invisible, although numerically and socially present" (Morokvasic, 1983, p. 13). The presence of women has been finally acknowledged when they entered waged labour market (*ibid.*). For many migrant women the change from unpaid work in the home to paid work in the labour market came about through migration (Phizacklea, 1983). The assumptions of a male breadwinner family model and traditional gender roles have dominated classic migration theories (Ackers, 1998). Until the 1970s, most research and publications on international migration focused on male migrants only (Zlotnik, 2003). Female migrants began to appear in the literature from mid 1970s, whereas previously they were portrayed as "followers, dependants, unproductive persons, isolated, illiterate and ignorant" (Morokvasic, 1983, p. 16). More recent studies consider women to be active decision makers (Kindler & Napierała, 2010). It can be asserted that paid work in the developed world offered to migrant women from less developed countries is one way for them to escape the oppressive patriarchal traditions in their homeland (Morokvasic, 1983). However, the labour migration literature fails to recognise whether the dominant economic model of migration – male breadwinning and profit-maximising – evident in academic literature, is founded on empirical evidence or is simply a convenient ideological construct. Hence, additional studies on migrant women and their strategies of negotiating gender norms in respect of paid employment and unpaid informal familial care work are needed.

It can be asserted that migrant women who are EU nationals migrating between different EU countries are an "under-researched group in their own right" (Ackers, 1998, p. 1). "It is not the absence of women, however, but their invisibility in the research that is at issue here ..." (*ibid.*, p. 139). Recent studies agree that female migration was previously dictated by purely economic reasons; now however, women migrate out of curiosity and interest in other cultures and foreign languages, for instance (Kindler & Napierała, 2010). Furthermore, Anthias and Yuval-Davis (1992) argue that the existing literature considers migrant women to be incorporated in an

ill-defined category of women, despite the fact that their migratory experiences are very much affected by their individual circumstances (i.e. the intersection³ between their ethnicity, nationality, religion, culture, tradition, etc.).

According to some previous studies, migrant women, in contrast to men, are often over-represented in the low-paid and low-skilled occupations (Castles & Miller, 2009). However, more recent studies on A8 migration question this view (cf. Grabowska-Lusińska, 2012; Kindler & Napierała, 2010) and certain evidence suggests that Polish women who have migrated to the UK post 2004 have higher levels of educational qualifications than their male counterparts (Grabowska-Lusińska & Okólski, 2008; CBOS, 2006). Moreover, Castles and Miller (2009) suggest that we can now observe a 'feminisation of migration'. Others reject this view as misleading, as it suggests a sudden large overall increase in the number of female migrants, whereas there have long been a significant proportion of women among migrants (UN-INSTRAW, 2007). Zlotnik (2003) however, notes the increase is nonetheless substantial: in the 1960s women constituted 47 per cent of all international migrants; by 1990 that number had increased to 48 per cent and in 2000 to almost 49 per cent. Nevertheless, when taking Europe into account, in 1990 female migrants constituted almost 52 per cent of all migrants and by 2000 the figure had reached 52.4 per cent (*ibid.*).

Despite this, women are seen as the carriers of tradition rather than change (Yuval-Davis, 1997). Engle (2004) indicates that the contrast between women's migrations in the 19th and 21st centuries lies in the reasoning of their travels. She writes, "in fact, gender (i.e. perceived roles, responsibilities and obligations – or the lack thereof) may be the single most important factor influencing the decision to migrate" (*ibid.*, p. 6) and that:

"Women have always migrated; but, whereas in the past their movement was often more directly related to family reunification or depended on a male migrant, today they are moving as primary migrants in their own right" (*ibid.*, p. 17).

Methods

An abductive research strategy was employed. This strategy was chosen as the researcher is interested in social actors' meanings and interpretations of reality. This strategy allows movement from the social actors' interpretations (i.e. Polish migrant women's) to more scientific understandings of the social world (i.e. academic theorists). It was chosen over the inductive and deductive strategies as it requires the researcher to step into the research participants' world and "discover their constructions of reality" (Blaikie, 2007, p. 10). This research strategy is particularly well suited to the chosen philosophical framework (i.e. idealist ontology, epistemology of constructionism).

³ A discussion of the concept of intersectionality is outside the scope of this article.

This qualitative study explores gendered experiences of Polish migrant women in relation to work (paid/unpaid) and welfare (formal/informal). This approach is suitable for examining gender roles and migrant women and particularly relevant because migration has, for a long time, been androcentric, with women essentially being invisible (Morokvasic, 2004; Phizacklea, 1983; Oakley, 1981). Feminist researchers argued that their research has to be based on women's experiences and that "the cultural background of the researcher is part of the evidence" (Blaikie, 2007, p. 166). This is important in light of the fact that the researcher is also a Polish migrant woman who, in 2008, decided to make the UK her home. Feminist scholars recognise that women cannot be treated as research objects and that subjectivity is not necessarily unscientific or unwanted (Stanley & Wise, 1990). The project was underpinned by the view that knowledge in social sciences has a male bias and balance is needed (Finch, 1991).

Qualitative in-depth semi-structured interviews were the chosen research tools. Each interview, on average, lasted 45 minutes. Firstly, interviews in the North West of England were conducted. This part of England was chosen as the area with the second highest population density in England (ONS, 2011). What is more, this area was chosen due to the established links with the migrant community. This was followed by interviews in Poland. The empirical research focused on the migratory movements of women moving between Poland and the UK and the way in which these movements may shape their perception of gender roles.

Strategic purposive sampling was adopted (Mason, 2002). Snowballing was also used to identify suitable individuals who fit the selection criteria to be included in the sample (Ritchie, Lewis & Elam, 2003). Snowball sampling proved to be particularly useful for accessing Poland based participants. The sample consists of two groups of Polish migrant women: migrants who at the time of the interview were based in the UK (16 interviews); and returnees⁴ who were based in Poland as they migrated to the UK post 2004 but have subsequently relocated back to Poland (16 interviews). The sample consists of a wide range of individuals who are between 20 and 57 years of age (with the majority between 26 and 33 years old); and have been (in case of migrants) or were (returnees) in the UK for a period of between six months and nine years. Exactly half of the interviewees whose views are presented in this article have secondary education, the other half higher education; half of them come from small towns or villages, the other half from cities. The majority of the migrants have been in the UK for more than 4 years. All of the return migrants lived in the UK for more than 3 years. The data is anonymised, all names are pseudonyms chosen by the respondents.

Women's perceptions of gender roles in Poland

Many interviewees perceive the division of responsibilities to be relatively traditional in Poland (cf. Kindler & Napierała, 2010). It seems as though the respondents

⁴ In this paper return migrants are not dealt with separately.

think that household tasks are almost entirely taken care of by women. However, a number of the women interviewed pointed out that this is currently undergoing change. Wiktorina for instance, described her very traditional arrangements back in Poland but explained that in her opinion, it has been undergoing change in the light of women's greater engagement in paid work which has often been facilitated through migration. Wiktorina's views reflect the pressure put on women to 'have it all'.

I'd come home from work and I'd have to look after the house [laughs] and the child and everything, mostly it is like that, so really they [men] do very few of those jobs, very few I think because they think that they work [in the paid labour market] so they only have to sit around, come home and lie down and don't give a crap about anything, that's the truth. That's true, but women have to do it all. (Wiktorina, UK based, 48)

Barbara was positively surprised with what she experienced in the UK. Having had rather negative experiences in Poland and having moved to the UK to join her husband after selling all they had in order to afford the flight fares, she was astonished by the way she has been treated in the UK. She emphasised the importance of what people observe at home and explained that the movement to the UK impacted positively on her life.

Finally after all these years I'm starting to open my eyes and I say, "Why did I go through all that? Why so many tears? Why does my back hurt? Why did I have a stroke? So what if he [the husband] had a job?" Sorry but he's also got 2 hands, 2 feet and a head (...) but there's also a lot of influence on our behaviour from stereotypes we pick up at home, things our mothers or grandmothers or great-grandmothers taught us and then we go backwards, there are stereotypes passed down from generation to generation. (Barbara, UK based, 37)

Kornelia explained that she always questioned the traditional domestic arrangements in Poland. She was not in favour of this clear delegation of different tasks between men and women with women doing the lion's share of housework. When Kornelia contrasted Poland with the UK, it was clear that she preferred the British arrangements.

I never understood when I was young, why the roles are so separate and that my dad could put his feet up, sit there and watch telly and my mum would basically work all night and do everything at home, I never understood it when the whole family would come round and my granddad and my dad would sit there and drink vodka and my mum and grandma basically, from morning 'til night, would take care of the cleaning, the cooking, getting lots of things ready for Christmas when they [the men] only had to light the fire, I didn't understand it, I rebelled against it. (Kornelia, UK based, 37)

Anna also described Poland as a particularly conservative country, where religion and what comes with it – the church and the family have a major influence on people's lives (Temple & Judd, 2011). In her opinion, because those two institutions: the church

and the family are highly valued, the majority of people follow the traditional division of responsibilities. Anna also pointed to the pressure to start a family at young age which can disadvantage women in their career attainment (Irek, 2011).

Religion still has a lot of influence [in Poland], honestly the church has a hell of a lot to say in the country and makes a hell of a lot out of it. Also family is really important there, it seems to me that in the UK family relationships are such that kids grow up, they go and do what they want and if their folks want to visit them they have to call first to see if they're even home and in Poland it's different, there are a lot of very tight relationships between the close and wider family, girls still get married very young, right after university or even when they're still at uni, it's sick, and mum chooses their wedding dress and mum is more involved in their lives than their husbands, it seems to me that we're really conservative. (Anna, Poland based, 31)

Many respondents show evidence of being socialised into being 'the guards' of cleanliness, food and the children. Lena for example, was taught traditional gender roles at home but now shares responsibilities with her Polish partner and notices little things she does that remind her of her mother (e.g. being unable to relax when the flat is untidy). Perhaps this confirms the fact that, throughout their lives, women actively engage with the roles they have been assigned. Another interviewee, Ola noticed that women are encouraged to go on maternity leave very early in Poland. This may affect them negatively when competing with men in the paid labour market. She observed positive differences in the UK in this respect.

In Poland it's normal to leave work as soon as you're pregnant, that's how it was for me, the doctor wanted me to leave right away basically (...) I know that in the UK it isn't like that, I know women who worked almost until the end, two weeks before labour they went on maternity leave... and [in Poland] as soon as they're pregnant they leave (...) I think that in that sense women in England are less discriminated against than in Poland, that's what it seems to me. (Ola, Poland based, 29)

Women's perceptions of gender roles in the UK

A number of respondents pointed to the positive differences between Poland and the UK in respect of gender roles. Kinga, quoted below, was taught traditional roles at home; however, she talked with jealousy about some British women's lives. Kinga clearly sees domestic work (i.e. washing, cleaning, and cooking) as traditionally women's responsibilities in Poland. It is evident that Kinga (as other research revealed cf. White, 2011) perceives the UK to be more equal in respect of the division of gendered roles in regard to paid work and unpaid care between partners in a relationship.

I think it's good that women can drive buses here in England, they are not discriminated as much, it's not like in Poland that a woman won't be able to handle things, like a woman behind the wheel, is terrible right? And here [UK] women drive those buses and it's no surprise you know. (...) I really think a lot of Brits, which is strange for me, here, I see a lot of young guys with prams, pushing those prams around so that women can have a break at home, the guy takes the kid out for a walk and that's a real shock for me, 'cos I've got a Polish husband myself and I don't remember him ever taking our kid in the pram and just going to the park for example, the majority of roles, in terms of Polish culture, are done by me, even when I had a job I'd go to work [paid work] then I'd come home and do the housework and then there's the kids, and my husband ... everything is really down to me and here relationships seem to be more equal. (Kinga, UK based, 25)

It appears that some respondents think that British men are more helpful and supportive when compared to Polish men whereas British women are viewed as less hardworking when compared to Polish women. As a result this may help to facilitate a more equal division of responsibilities. Making comparisons can sensitise women and make them realise that what they were taught is not necessarily the only or the best way forward.

I see here in England that it's different, there aren't those roles, 'cos I've spoken to English people [men] at work, I asked them about different things, one's got a girlfriend, the other's married and I'd ask: "so what do you do at home?" "Well, when I come home from work I cook dinner", and I'd always blink and say: "you cook dinner?" "Every day?" "Yeah, every day because I get home earlier (...) so I cook everyday 'cos dinner's got to be made right?", the same with a lot of different chores, like cleaning or whatever ... that they made cakes and cooked, and they weren't at all embarrassed, they didn't say that they thought it was unmanly or whatever ... err those are I guess big differences between British men and Polish men. (Kornelia, UK based, 37)

Although many of the migrant women interviewed recognise that gender divisions operate in the UK too, gender roles are perceived as less rigid in the UK compared to Poland (cf. White, 2011). As the interviewees explained, in the UK they cannot be distinguished as easily and domestic tasks are not as clearly divided between partners as they are in Poland. In Poland it is expected of women that they do the care and domestic work, whereas in the UK it seems that it all depends on partners achieving a balance and agreement in respect of their shared responsibilities.

There is patriarchy here [UK] but women are more cunning, which doesn't mean it doesn't affect their femininity in some way, they are aggressive [women in the UK], I hate this aggression in women here but it's [gender roles] here all more blurred than in Poland for sure. (Oliwia, UK based, 37)

Respondents are rather clear about the differences they observed between Poland and the UK. Ariela noticed more equality in the UK when compared to Poland. She

talked about less pressure on women who are expected to take care ‘of everything’ in Poland. A number of respondents claimed that British women are more relaxed, they do not take on too many tasks, do less at home. Women in the UK are seen to have either careers or tidy houses; at least this is how many interviewees see British women’s lives.

I think that this migration has had a big impact because people have gone back and look at things differently, just the fact that they travel... there’s definitely a difference between English and Polish women because a woman in England doesn’t have the same pressure on her to take care of everything, to sort everything out, she either has a career or she takes care of the house but in Poland there is the tradition that a woman looks after the house that she washes and cleans, and on top of that she works. (Ariela, Poland based, 26)

Migration as opportunity

Having recently completed fieldwork (Oct 2012 – Feb 2013) and conducted 32 in-depth interviews with Polish migrant women, the researcher would like to share some preliminary findings in regard to the impact of the migratory process on gendered lives of migrant women. This and the following section reflect initial results that emerge from the data in respect of the impact of the migratory process. Arguably, the process (or processes, cf. Ackers & Gill, 2008) of migration gives women the opportunity to question and potentially re-define their gender roles (Ryan *et al.*, 2009). Migration can be viewed as an opportunity to re-evaluate women’s gendered responsibilities in respect of work and welfare. Through migration, women are exposed to different social settings with often different gendered responsibilities (Datta, 2009). They can then compare and contrast how gender roles have played out in the UK in comparison to Poland. This could provide an opportunity to question their current arrangements and perhaps over time change expectations in respect of the gendered division of labour. Within the sample it is evident that migration has made women realise that gender roles are less rigid in the UK which can have a positive impact. In the UK, gendered responsibilities do not seem to be as cemented in place as they are in Poland (White, 2011). Therefore, through migration to the UK, Polish migrant women often start to re-evaluate their gender roles.

What women were taught in their home country matters greatly; as they observed their mothers and grandmothers then they often duplicate the same roles. Some respondents admit that migrating has taught them a lot. Being able to observe how others arrange their lives makes women think of theirs. Knowing that ‘things could be done differently’ often makes women consider changing their current arrangements. Kornelia for instance, seems to recognise major differences in gender roles between the two countries. She appears to realise the value of being exposed to another culture. It is seen almost as an eye-opening experience and a learning opportunity.

I came across my friends' opinions in Poland, friends of course who have never been abroad either travelling or working and have never come across other cultures, and opinions like if you don't cook a fresh pork chop on that day then you're not a real woman. (Kornelia, UK based, 37)

Certain respondents admit to manipulating the roles they are expected to take on. Ksenia, for instance, argues with her British partner who expects her to share responsibilities equally. Ksenia does not seem to be interested in sharing all of the tasks. However, she admits that she would like to take care of the children herself when they come. The women in this study seem to be socialised into mostly traditional attitudes towards their responsibilities but they appear to actively engage with what they are offered. This means they can choose from both Polish and British traditions and lifestyles as they deem appropriate.

In my relationship sometimes there are exactly those discussions about roles, my partner is very very very for equal rights (...) I think that's the influence of his family because it's a completely different type of family in which he grew up, the mother was the father, she made the money, the roles were reversed (...) because women here [UK] have had professional success for a long time now; that's the British image which goes a little against mine, but I think it's a little egotistical on my part because I know that I try to manipulate the roles and when something is not convenient for me then I try to explain that women shouldn't assemble furniture for example. (Ksenia, UK based, 32)

Arguably, and as reported by other scholars (cf. Isański & Luczys, 2011), migration opens up a different way of seeing the world. Migration gives a certain amount of freedom in respect of gender roles as the available options become greater. Anna for instance, recognises changes which are in her opinion, the consequence of people's migrations that make them become more open to other cultures and lifestyles.

Because people have started travelling, there are more opportunities, that's what it's about (...) Jesus, back then [2004] Poles started to fly in planes to wherever, yeah ... it's great and that's why I think that we started to basically open up abroad, to go places, to travel, to see that it can be different and then you bring it back here [to Poland] basically it seems to me. (Anna, Poland based, 31)

Some migrant women explained that even though they consider themselves to be the weaker sex and are in favour of a more traditional division of responsibilities, they had to adopt some changes as a consequence of the kind of paid work they do in the UK. This suggests that women's gendered responsibilities can also be transferred with them to the UK but often need to undergo re-evaluation adequate to the new situation (cf. White, 2011).

He [boyfriend] sometimes argues with me because I'm a woman so I should clean more but it's that we came here to work, we both work in the same place [factory], do the same

work [on a production line] (...) But we more or less share the work at home, if anything he does more than me, it's like that here, in England, in Poland it was different, he did manly things like renovating something and I did the cooking and cleaning but now because we work in the same company, he has to support me more and do more at home, besides when I carry sacks of potatoes and he packs cheese which happens a lot, then it's not fair and he has to help me at home, right? (Ewa. UK based, 25)

Migration proves to be an opportunity to implement changes in the light of adjustments post migratory experience or simply as a result of what women observe and prefer. It demonstrates a chance to experience new social and cultural setting and gain an understanding of the new location and its mechanisms. This, in effect, can have a positive impact on women's gender ideology and consequently in the long run, can foster gender equality.

Discussion

The Migratory process, which may include one (or more) international movement, settlement (for shorter or longer periods of time) and everyday life in the host country, may have a variety of effects on women's gendered lives. Within the sample which consists of two groups of migrant women based in two different countries, Poland and the UK, it is clear that women's gendered perceptions in relation to work and welfare are often subject to re-consideration. Migration presents an opportunity to do that, it gives women the occasion to examine their existing situation (White, 2011). In light of what women experience and observe in the receiving country, they may be empowered to change their views and challenge their current arrangements. It can be asserted that migration opens up a different way of perceiving the world, since: "the flows of people bring an exchange of ideas and influences in both directions" (Temple & Judd, 2011, p. 16). This research confirmed some earlier studies' findings (cf. Datta, 2009) which noted evidence of change as the consequence of encountering new people and social and cultural settings.

The majority of the women interviewed seem to favour a partnership over a more traditional division of responsibilities but their understanding of a partnership seems to be somewhat distorted by what they were taught in their home country. The majority of respondents come from quite traditional families (which, some may argue, is the norm, CBOS, 2009; Pascall & Lewis, 2004) where the man acts as the main breadwinner and the woman the caregiver and it seems as though a partnership for them means any relationship that is different from this norm. In this view, a partnership does not suggest sharing work equally but having some (more or less) assistance with domestic and care work at home. It appears that as women observed different norms, different lifestyles that the members of the host population have, they are now more likely to question their present arrangements (cf. White, 2011). They appear to become somewhat empowered to challenge the status quo (Kindler & Napierała, 2010). Moreover, through the process of being interviewed and

questioned about the division of domestic responsibilities, women were encouraged to think about this particular issue. As a result, they may reconsider their current situation and their expectations may change.

The preliminary findings demonstrate that the migratory process, which, in this case, included migratory moves between Poland and the UK, being exposed to a multicultural setting whereby an individual resides and often works thus comes in contact with new social norms in a Western setting, often carries the potential to alter people's current life arrangements. In the light of what migrants observe in the host country, they often actively redefine or renegotiate their gendered responsibilities (cf. Ryan, *et al.*, 2009). Other people's (e.g. the host population) arrangements often become a point of reference against which migrant women's experiences are measured. Being exposed to the above enables them to question their existing life patterns, which then may undergo change if they seem to be more advantageous to those in question.

It can be asserted that migration is "an ageless human strategy to improve life" (Borkert, *et al.*, 2006, p. 1). Kosack (1976) posed the question "the move to Western Europe – a step towards emancipation?" Arguably, "migration is in direct opposition to their [women's, particularly single women's] gender roles as caregivers and kin keepers in their families and communities" (Aranda, 2003, p. 624), hence it has the potential to free them from their present responsibilities as primary care givers and home makers. Therefore, migration may prove to open up opportunities to bring about change. It can be argued that through migrating, women are constantly exposed to new social and cultural norms and different lifestyles which may affect their views on the values they were taught in their home country. This may have positive consequences when it comes to gender equality in their country of origin (Caritas, 2011). This may be the case, especially when the women in question decide to return to their home country and may bring back not only remittances but new ideas in respect of their life from now on. The reader, however, should bear in mind that those are preliminary results as a comprehensive analysis has yet to be conducted. Nevertheless, in the context of ageing populations and declining birth and fertility rates (Pascall & Kwak, 2005), the importance of this research cannot be dismissed. It adds to the theoretical developments in the area of social policy in relation to gendered citizenship, gendered migration and Polish migrant women in the UK. In the long run, it has the potential to contribute to the current debates on gender equality and the work-life conflict in the two countries under consideration (cf. Plomien, 2009).

Acknowledgements

Funding for this doctoral research has been provided by the Graduate Teaching Studentship Scheme from the University of Salford. Funding for the fieldwork was secured from the Jagiellonian University Polish Research Centre in London. The views expressed in this article are the views of the author and do not reflect the opinions of the above institutions.

References

- Ackers, L. (1998). *Shifting Spaces. Women, citizenship and migration within the European Union*. Bristol: The Policy Press.
- Ackers L. & Gill B. (2008). *Moving People and Knowledge: Scientific Mobility in an Enlarging European Union*. Glos: Edward Elgar Publishing Limited.
- Anthias, F. & Yuval-Davis, N. (1992). *Connecting race and gender*. in: F. Anthias; N. Yuval-Davis, *Racialized boundaries. Race, nation, gender, colour and class and the anti-racist struggle*, pp 96-131. London: Routledge.
- Aranda, E.M. (2003). *Global Care Work and Gendered Constraints: The Case of Puerto Rican Transmigrants*. "Gender and Society", 17(4), pp. 609-626. doi: 10.1177/0891243203253573
- Bakalar, A.M. (2013). *An important lesson for Polish migrants in the Before You Go film*. "The Guardian". Retrieved 14 July 2013 from: <http://www.guardian.co.uk/commentisfree/2013/jun/19/before-you-go-film-polish-migrants>
- Blaikie, N. (2007). *Approaches to Social Enquiry*. Cambridge: Polity Press.
- Borkert, M., Perez, A.M., Scott, S. & De Tona C. (2006). *Introduction: Understanding Migration Research (Across National and Academic Boundaries) in Europe*. "Forum: Qualitative Social Research", 7(3).
- Caritas (2011). *The Female Face of Migration*. Retrieved from: <http://www.caritas.org/includes/pdf/backgroundmigration.pdf>
- Castles, S. & Miller, M. (2009). *The Age of Migration. International Population Movements in the Modern World*, 4th ed. Basingstoke: Palgrave Macmillan.
- CBOS (2009). *Kobiety 2009. Raport z badań*. Warszawa. Retrieved from: http://www.cbos.pl/PL/wydarzenia/05_konferencja/wyniki_badania_kobiety2009.pdf
- CBOS (2006). *Kobiety i mężczyźni o podziale obowiązków domowych. Komunikat z badań*. Warszawa. Retrieved from: http://www.bezuprzedzen.org/doc/kobiety_i_mezczyzni_o_podziale_obowiazkow_domowych_2006_CBOS.pdf
- CBOS (2006). *Praca Polaków w Krajach Unii Europejskiej. Komunikat z badań*. Warszawa. Retrieved from: http://www.cbos.pl/SPISKOM.POL/2006/K_175_06.PDF
- Cook, J., Dwyer, P. & Waite, L. (2011). *The experiences of Accession 8 migrants in England: Motivations, work and agency*. [Electronic version]. "International Migration", Vol. 49, No. 2, 54-79.
- Cooke, L.P. (2011). *Gender-class equality in political economies*. New York: Routledge.
- Cox, S. (2008). *What if all the Poles went home?* BBC News. Retrieved from: <http://news.bbc.co.uk/1/hi/magazine/7316261.stm>
- Datta, A. (2009). *Places of everyday cosmopolitanisms: East-European construction workers in London*. "Environment and Planning A", 41(2), pp. 353-370. doi: 10.1068/a40211.
- Drinkwater, S; Eade, J. & Garapich, M. (2006). *Poles Apart? EU Enlargement and the Labour Market Outcomes of Immigrants in the UK*. IZA Discussion Paper No. 2410. Bonn: The Institute for the Study of Labour IZA.

- Drummond, M. & Judd, D. (2011). *Challenges to migration*. in: B. Temple, D. Judd & J. Krzyszkowski (eds.), *Polish Journeys: Through Social Welfare Institutions* (pp. 170-199). Warszawa: Dom Wydawniczy ELIPSA.
- Engle, L. B. (2004). *The World in Motion. Short Essays on Migration and Gender*. Switzerland: International Organisation for Migration.
- Finch, J. (1991). *Feminist research and social policy*. in: M. Maclean & D. Groves (Eds.), *Women's Issues in Social Policy* (pp. 194-204). London: Routledge.
- Grabowska-Lusińska, I. (2012). *Migrantów ścieżki zawodowe bez granic*. Warszawa: Wydawnictwo Naukowe Scholar.
- Grabowska-Lusińska, I. & Okólski M. (2008). *Migracja z Polski po 1 maja 2004 r.: jej intensywność i kierunki geograficzne oraz alokacja migrantów na rynkach pracy krajów Unii Europejskiej*. Centre of Migration Research, CMR Working Paper No 33/9, Warsaw: Warsaw University.
- Irek, M. (2011). *The Myth of 'Weak Ties' and the Ghost of the Polish Peasant: Informal Networks of Polish Post-Transition Migrants in the UK and Germany*. Working Paper No. 87, Centre on Migration, Policy and Society. Retrieved from: <http://www.compas.ox.ac.uk/publications/working-papers/wp-11-87/>
- Isański, J. & Luczys, P. (2011). *Introduction*. in: J. Isański & P. Luczys (eds.), *Selling One's Favourite Piano to Emigrate*, (pp. xi-xxiv). Newcastle upon Tyne: Cambridge Scholars Publishing.
- Kindler, M. & Napierała, J. (2010). *Wstęp*. in: M. Kindler, & J. Napierała (eds.), *Migracje kobiet: przypadek Polski* (pp. 7-36). Warszawa: Wydawnictwo Naukowe SCHOLAR.
- Kofman, E. (2004). *Gendered Global Migrations: Diversity and Stratification*. "International Feminist Journal of Politics", Vol. 6, No. 4, 643-665.
- Kosack, G. (1976). *Migrant women: the move to Western Europe – a step towards emancipation?* "Race Class", 17, pp. 369-379. doi: 10.1177/030639687601700402
- Mason, J. (2002). *Qualitative Researching*, London: SAGE Publications Ltd.
- Massey, D., Arango, J., Hugo, G., Kouaouci, A., Pellegrino, A. & Taylor, E. (1993). *Theories of International Migration: A Review and Appraisal*. in: R. Cohen (ed.), *Theories of Migration* (pp. 181-216).
- Morokvasic, M. (2004). *'Settled in Mobility': Engendering Post-Wall Migration in Europe*. "Feminist Review", Vol. 77, 7-25.
- Morokvasic, M. (1983). *Women in Migration: Beyond the Reductionist Outlook*. in: Phizacklea Ann, Ed., *One Way Ticket: Migration and Female Labour* pp 13-32. London: Routledge & Kegan Paul plc.
- Oakley, A. (1981). *Interviewing women: a contradiction in terms*. in: H. Roberts (ed.), *Doing Feminist Research* (pp.30-62). London: Routledge & Kegan Paul Ltd.
- ONS (2011). *Regional Profiles – Population and Migration – North West – October 2011*. Retrieved 25 June, 2012, from: <http://www.ons.gov.uk/ons/rel/regional-trends/region-and-country-profiles/population-and-migration/population-and-migration--north-west.html>

- Pascall, G. & Kwak, A. (2005). *Gender regimes in transition in Central and Eastern Europe*. Bristol: The Policy Press.
- Pascall, G. & Lewis, J. (2004). *Emerging Gender Regimes and Policies for Gender Equality in a Wider Europe*. "Journal of Social Policy", 33(3), pp. 373-394. doi: 10.1017/S004727940400772Z
- Pessar, R. & Mahler, S. J. (2003). *Transnational Migration: Bringing Gender in*. "International Migration Review", Vol. 37, No. 3, 812-846.
- Phizacklea, A. (1983). *Introduction*. in: Phizacklea Ann, Ed, *One Way Ticket. Migration and Female Labour*, pp 1-13. London: Routledge & Kegan Paul plc.
- Pidd, H. (2011). *Poland: Immigration to UK is back for good life despite economic crisis*. "The Guardian". Retrieved from: <http://www.guardian.co.uk/world/2011/may/27/poland-immigration-uk-economic-crisis>
- Plomien, A. (2009). *Welfare State, gender and Reconciliation of Work and Family in Poland: Policy Developments and Practice in a New EU Member*. "Social Policy & Administration", 48(2), pp. 136-151. doi: 10.1111/j.1467-9515.2009.00652.x
- Pollard, N. & Latorre, M. & Srisikandarajah, D. (2008). *Floodgates or turnstiles? Post-EU enlargement migration flows to and from the UK*. London: The Institute for Public Policy Research.
- Ramesh, R. (2010). *Homeless Poles living on barbequed rats and alcoholic handwash*, "The Guardian". Retrieved from: <http://www.guardian.co.uk/uk/2010/aug/12/homeless-poles-rough-sleepers>
- Ritchie, J., Lewis, J. & Elam, G. (2003). *Designing and Selecting Samples*. in: J. Ritchie & J. Lewis (eds.), *Qualitative Research Practice* (pp. 77-137). London: SAGE Publications Ltd.
- Ryan, L., Sales, R., Tilki, M. & Siara, B. (2009). *Family Strategies and Transnational Migration: Recent Polish Migrants in London*. "Journal of Ethnic and Migration Studies", 35(1), pp. 61-77. doi: 10.1080/13691830802489176.
- Ryan L. & Webster W. (2008), *Gendering Migration: Masculinity, femininity and Ethnicity in Post-War Britain*. Hampshire: Ashgate Publishing Limited.
- Scullion, L. & Morris, G. (2010). *Central and Eastern European migrant communities in Salford and Bury*. Salford: University of Salford.
- Siara, B. (2009). *UK Poles and the negotiation of gender and ethnicity in cyberspace*. in: K. Burrell (ed.), *Polish migration to the UK in the 'new' European Union: After 2004* (pp. 167-187). Farnham: Ashgate.
- Slany, K. (2008). *Co to znaczy być migrantką?* in: K. Slany (ed.) *Migracje Kobiet. Perspektywa wielowymiarowa*. Kraków: Wydawnictwo Uniwersytetu Jagiellońskiego.
- Stanley, L. & Wise, S. (1990). *Method, methodology and epistemology in feminist research process*. in: L. Stanley (ed.), *Feminist Praxis* (pp. 20-60). London: Routledge.
- Temple, B. & Judd, D. (2011). *Introduction*. in: B. Temple & D. Judd (eds.), *Polish Journeys: Through Social Welfare Institutions* (pp. 9-26). Warszawa: ELIPSA.

- Trevena, P. (2009). *'New' Polish migration to the UK: A synthesis of existing evidence*. ESRC Centre for Population Change Working Paper Number 3. Retrieved from: <http://eprints.soton.ac.uk/72026/>
- United Nations International Research and Training Institute for the Advancement of Women (UN-INSTRAW) (2007). *Feminisation of Migration*. Working Paper 1. Retrieved from: http://www.renate-europe.net/downloads/Documents/Feminization_of_Migration-INSTRAW2007.pdf
- Vertovec, S. (2007). *Superdiversity and its implications*. [Electronic version]. "Ethnic and Racial Studies", 30(6), pp. 1024-1054.
- White, A. (2011). *Polish Families and Migration since EU Accession*. Bristol: The Policy Press.
- Woodward, K. (2011). *The short guide to gender*. Bristol: The Policy Press.
- Yuval-Davis, N. (1997). *Gender & Nation*. London: SAGE Publications Ltd.
- Zlotnik, H. (2003). *The Global Dimensions of Female Migration*, Migration Information Source. Retrieved from: <http://www.migrationinformation.org/feature/display.cfm?ID=109>

Streszczenie

Migracje z nowych państw członkowskich Unii Europejskiej (UE) do Wielkiej Brytanii (UK) zostały określone jako jeden z najbardziej znaczących procesów społecznych ostatnich czasów. Migracje te stanowią popularny przedmiot badań szczególnie po roku 2004. Pomimo tego iż studia genderowe zyskują uznanie, niewiele z nich uwzględnia polskie migrantki. Źródła podają, że migrantki stanowią dużą część międzynarodowych migrantów, zaś w kontekście europejskim, migrujące kobiety przeważają nad migrującymi mężczyznami.

Powyższy artykuł został stworzony na podstawie przeglądu źródeł zastanych oraz wstępnych wyników z nowych badań jakościowych przeprowadzonych w Polsce oraz w Wielkiej Brytanii. Artykuł ten opisuje, jak polskie migrantki negocjują swoje obowiązki w odniesieniu do pracy na etacie oraz opieki nad domem/dziećmi, kiedy przemieszczają się między krajami UE jako jej obywatelki. Autorka argumentuje, iż migrantki powinny być postrzegane jako aktywne decydentki, zaś sam proces migracyjny niesie ze sobą potencjał zmian w kwestii ich ról płci. Konkludując, proces migracyjny może zainicjować ponowną ocenę ról związanych z płcią.

Słowa kluczowe: role płci, migrantki, Polska, Wielka Brytania, dobrobyt

RECENZJE

Barbara Rysz-Kowalczyk
Instytut Polityki Społecznej
Uniwersytet Warszawski

Podręcznik usług społecznych – przykład Niemiec

Adalbert Evers, Rolf G. Heinze, Thomas Olk (red.), Warszawa 2013, 611 s.

Recenzowana książka została przetłumaczona z języka niemieckiego i wydana w serii „Współczesna polityka społeczna” przez Wydawnictwo Wyższej Szkoły Pedagogicznej im. Janusza Korczaka w Warszawie. Napisano ją jako podręcznik – co zostało dobitnie zaakcentowane w samym tytule i w treści *Wprowadzenia*. Redaktorzy tomu wyjaśniają w nim, że motywem napisania książki było wypełnienie luki w literaturze na temat usług społecznych, w której brakuje właśnie kompendiów i podręczników. Wypełnianie luki – zdaniem redaktorów – polegało także na wprowadzeniu podejścia odmiennego od dotychczas dominującego w publikacjach o usługach społecznych. Autorzy podręcznika proponują bowiem spojrzenie na usługi społeczne jako „architekturę» nowoczesnego państwa opiekuńczego i struktury świadczeń społecznych” (s. 13), w przeciwieństwie do podejścia, w którym są one rozważane głównie jako element poszczególnych dziedzin polityki społecznej (polityk sektorowych).

Odnosząc się do deklaracji redaktorów w wyżej wskazanych kwestiach, warto zaznaczyć, że niektóre rozdziały – ze względu na charakter rozważań, stosowaną terminologię czy sposób narracji – trudno uznać za typowe dla podręczników. Chyba, że potraktujemy je jako części podręcznika przeznaczone dla odbiorcy bardziej zaawansowanego, przygotowanego erudycyjnie. Tak więc, z punktu widzenia wiedzy wstępnej, potrzebnej czytelnikowi w lekturze i percepcji treści – książka nie stanowi jednolitej całości. Ale nie jest to zarzut, a jedynie konstatacja. Wspomniane zróżnicowanie może być zaletą bądź wadą – w zależności od tego, w jaki sposób podręcznik jest/będzie wykorzystywany w praktyce dydaktycznej. Dodam również, że autorzy nie odrzucili całkowicie perspektywy „sektorowej”. Jedną z pięciu wyodrębnionych części książki

zawiera bowiem rozdziały napisane w tej właśnie konwencji i zebrane pod stosownym tytułem: *Usługi społeczne w poszczególnych dziedzinach i sektorach*.

Charakteryzując ogólne założenia tej publikacji, można powiedzieć, że autorzy koncentrują się na prezentacji aktualnego stanu wiedzy na temat głównego przedmiotu rozważań (usług społecznych) w danym miejscu (Niemcy); z uwzględnieniem perspektywy historycznej i perspektywy porównawczej, ze wskazaniem aktualnych problemów i prognoz, z odniesieniami do koncepcji teoretycznych i metodologicznych oraz do danych diagnostycznych. Te ostatnie są zresztą stosowane z umiarem. Na aprobatę zasługuje fakt, że w przeciwieństwie do wielu podręczników do polityki społecznej pisanych przez polskich autorów, tutaj treści nie są przeładowane danymi statystycznymi, nie grozi im więc szybka dezaktualizacja.

Podręcznik jest pracą zbiorową napisaną przez aż 33 autorów. Siłą rzeczy, ma zalety i ułomności charakterystyczne dla tego rodzaju publikacji. Na przykład, dzięki podziałowi pracy wykorzystuje się pogłębioną wiedzę osób specjalizujących się w konkretnych kwestiach, ale ceną za to jest zwykle duże zróżnicowanie sposobu narracji. W pracy zbiorowej trudniej jest też uzyskać właściwe proporcje pomiędzy podejmowanymi wątkami; trudniej o konsekwentnie uporządkowaną strukturę.

Redaktorzy podręcznika wyodrębnili pięć podstawowych części. Pierwsza, najobszerniejsza (230 stron), zatytułowana *Koncepcje, teoria, rozwój historyczny*, koncentruje się generalnie na trzech kwestiach: specyfice usług społecznych, cechach ich historycznego rozwoju i na jego uwarunkowaniach. Nie są one jednak omawiane w wymienionej sekwencji¹. Dziewięć rozdziałów pierwszej części tworzy bowiem mozaikę tekstów, w pewien sposób powiązanych, ale podejmujących trzy wymienione kwestie w różnym zakresie i z różnych punktów widzenia (wybranych koncepcji teoretycznych, kwestii prawnych, historycznego opisu zmian instytucjonalnych).

W drugiej części, pt. *Zarządzanie, własność i kontrola publiczna*, znalazły się zagadnienia modernizacji struktur i form zarządzania usługami społecznymi, ujmowane z uwzględnieniem perspektywy historycznej i koncepcji teoretycznych. W centrum uwagi autorów są tutaj pojęcia *welfare pluralism* i *welfare mix*, a więc podejmują oni rozważania na temat pluralizacji podmiotów i komplikowania się relacji między nimi (w tym – tzw. hybrydyzacji). Autorzy akcentują w szczególności związki omawianych spraw z procesem określanym jako ekonomizacja usług oraz ze zmianami zachodzącymi w statusie i roli odbiorcy usług społecznych, a także z ewolucją koncepcji zarządzania i „rządzenia” (*governance*).

Kolejna część, wspomniana już wcześniej, pt. *Usługi społeczne w poszczególnych dziedzinach i sektorach*, składa się z ośmiu rozdziałów, w których usługi społeczne są rozważane jako element polityk ujmowanych przedmiotowo (polityka zatrudnienia, pomoc społeczna) lub podmiotowo (polityka wobec dzieci, osób starszych, osób niepełnosprawnych). W tej części podręcznika czytelnik odnajdzie najwięcej konkretnych informacji o rozwiązaniach przyjętych w systemie usług społecznych w Niemczech. Są

¹ Kwestie te pojawiają się także w innych częściach podręcznika.

one przedstawiane w ujęciu krytycznym (zawierają oceny, relacjonują dyskusje nad kwestiami spornymi), skłaniają do porównań i formułowania na tym tle wniosków (a nawet przestróg) dla polskiej polityki społecznej.

Trzy kolejne rozdziały składają się na piątą część, pt. *Kultura i modele*. Są one inspirującym dopełnieniem rozważań na temat istoty usług społecznych, zawartych w innych rozdziałach książki. W pierwszym rozdziale tej części znajdziemy interpretację pojęcia „opieka” i próbę objaśnienia fenomenu polegającego na upowszechnieniu się w Niemczech angielskiego terminu *care*. W rozdziale tym scharakteryzowane są też wzorce opieki (tradycyjny, postmodernistyczny, zimno-nowoczesny, ciepło-nowoczesny) oraz modele „kultury opieki” (np. model pracującego Kopciuszka i model troskliwej Królowej Śnieżki). Drugi rozdział tej części zawiera analizę ewolucji cech usług społecznych, w szczególności przemian „społecznej konstrukcji” użytkownika (odbiorcy) usług w odniesieniu do głównych dyskursów o państwie opiekuńczym. Trzeci rozdział koncentruje się na kategorii „zarządzanie przypadkiem” (*case management*) w kontekście modernizacji systemu usług, ze wskazaniem pułapek i niebezpieczeństw jego implementacji.

Ostatnia część – pt. *Usługi społeczne w ujęciu międzynarodowym* – zawiera tylko jeden rozdział: *Unia Europejska i usługi świadczone w interesie ogólnym*. Jego autor przedstawia zmiany strukturalne w usługach skierowanych do osób, jako efekt oddziaływania na siebie nawzajem prawa Unii Europejskiej i prawa „narodowego”. Zagadnienia te pojawiają się fragmentarycznie także w innych rozdziałach.

Scharakteryzowane wyżej części poprzedza przedmowa do wydania polskiego (jej autorami są M. Grewiński i E. Przedecka) oraz *Wprowadzenie* napisane przez redaktorów podręcznika (A. Evers, R.G. Heinze, Th. Olk), opatrzone sugestywnym podtytułem: *Usługi społeczne – arena i generator zmian społecznych*. Jest to w istocie dość obszerny artykuł (26 s.) zawierający zarówno zapowiedź, jak i syntezę treści całej publikacji, a także wykładnię intencji i stanowiska redaktorów. Z tych względów zachęcam do lektury *Wprowadzenia* nawet/zwłaszcza tych czytelników, którzy ograniczą się tylko do wybranych rozdziałów. Warto przy tym podkreślić, że wybiórcze korzystanie z tego podręcznika nie jest trudne. Tytuły części i poszczególnych rozdziałów dość konsekwentnie odzwierciedlają zawarte w nich treści. Przeczytanie natomiast całej książki i jej przyswojenie za jednym razem – jest sporym wyzwaniem. Przyczynia się do tego zarówno jej objętość (ponad sześćset stron), jak i zróżnicowany charakter rozważań, wielość wątków i poziom trudności tekstów. Warto jednak podjąć ten wysiłek, bowiem dopiero lektura całej książki pozwala dostrzec w niej powracające motywy, tj. takie wątki analizy usług społecznych, które przewijają się w wielu rozdziałach, są rozwijane przez różnych autorów i omawiane z różnych perspektyw. Jeśli spróbujemy ująć je w logicznej sekwencji, to wyłoni nam się wówczas jeszcze inna struktura treści podręcznika niż ta, która wynika ze spisu treści. Składają się na nią m.in.: zagadnienia związane z definiowaniem usług społecznych i oddzielaniem tej formy usług od innych form; próby odtworzenia ewolucji usług społecznych – podstawowych tendencji; wyjaśnienia przyczyn zachodzących zmian (także w kontekście

porównawczym); rozważania wokół kluczowych współczesnych dylematów funkcjonowania usług społecznych, ujmowanych w perspektywie teoretycznej, aksjologicznej czy instrumentalnej; analizy wariantów decyzji stojących dziś przed politykami społecznymi oraz scenariuszy przyszłości wynikających z dokonywanych przez nich wyborów tych wariantów.

Próby zdefiniowania przedmiotu wykładu są podejmowane w wielu rozdziałach, a ich autorzy często akcentują heterogeniczność usług w ogóle i brak jednoznacznych definicji różnych ich rodzajów. W przypadku usług społecznych można wskazać zasadniczo dwa sposoby ich definiowania. Pierwszy z nich polega na wyliczeniu dziedzin działalności usługowej uznawanych za „społeczne” (np. edukacja, zdrowie, usługi pomocy społecznej, usługi rynku pracy). Drugi sposób polega na wskazaniu specyficznych cech usług społecznych, wyróżniających je spośród innych rodzajów usług. Autorzy podręcznika wybrali drugi sposób i większość wypowiadających się w tej kwestii przyjmuje, że usługi „społeczne” należą do szerszej kategorii: usług ukierunkowanych „na osoby” (w odróżnieniu od usług ukierunkowanych „na rzeczy” czy „na produkcję”). Najpierw więc wskazują cechy pozwalające wyodrębnić ze zbioru wszystkich usług – usługi ukierunkowane na osoby, a potem wskazują dwie cechy dodatkowe, specyficzne tylko dla podzbioru usług społecznych.

Najmocniej akcentowaną cechą usług skierowanych na osoby – wielu autorów poświęca jej sporo uwagi – jest równoczesność produkcji i konsumpcji (tzw. zasada *uno actu*). Ta cecha usług skierowanych na osoby jest przez autorów podręcznika nieodłącznie wiązana z kolejną cechą, tj. wytwarzaniem usług w wyniku bezpośredniej interakcji między producentem a konsumentem. Interakcyjność wymaga więc obecności konsumenta w procesie wytwarzania usług, zaś poziom współpracy (kooperacji) z usługodawcą jest jednym z czynników produktywności usług. Celem usług skierowanych na osoby jest bowiem zmiana możliwości działania konsumenta, stanu jego wiedzy lub dyspozycji fizycznej bądź psychicznej. Zagadnienia te najszerzej są rozwinięte w rozdziałach, których autorzy zajmują się transformacją pozycji i roli współczesnego odbiorcy usług społecznych, co znajduje wyraz m.in. w rozważaniach na temat terminologii (konsument, użytkownik, klient, koproducent, obywatel) czy rozważaniach dotyczących kompetencji usługobiorców do kooperacji w procesie wytwarzania usług bądź kompetencji do wyboru usługodawcy (przykładem może być ujmowanie odbiorcy usług społecznych jako „eksperta we własnych sprawach”). Trzecią dostrzeganą przez autorów podręcznika cechą usług skierowanych na osoby jest „nieindustrialny” model regulacji czasu pracy i organizacji pracy. Rozwinięcie zagadnień związanych z tą cechą usług społecznych odnajdziemy w rozdziałach, które skupiają się na zagadnieniach podziału pracy, dylematach standaryzacji usług czy kwalifikacji usługodawców.

Autorzy są zgodni co do tego, że poza cechami charakteryzującymi wszystkie usługi skierowane na osoby, podzbiór usług społecznych musi mieć jeszcze dwie inne swoiste cechy:

- ścisłe powiązanie z państwem socjalnym. Usługi społeczne są bowiem formą realizacji praw socjalnych (w postaci świadczeń społecznych), z czym wiąże

się znaczny stopień ich zinstytucjonalizowania (są regulowane przez instancję publiczną);

- występowanie w obrębie instytucjonalnych ram usług społecznych tzw. trójkąta stosunków społecznych. O ile w usługach rynkowych usługobiorca jest jednocześnie konsumentem i płatnikiem, to w usługach społecznych występuje stosunek trójstronny pomiędzy: podmiotem publicznym (płatnikiem), podmiotem prowadzącym placówkę produkującą usługi (mogą to być podmioty publiczne, rynkowe lub pozarządowe) i usługobiorcą.

Rozważania nawiązujące do cech specyficznych usług społecznych są osadzone w różnych kontekstach i można je odnaleźć w wielu miejscach podręcznika. Jednym z tych kontekstów jest historyczny rozwój usług społecznych. Perspektywą historyczną posługuje się kilku autorów. Gdyby pokusić się o syntezę ich rozważań na temat dotychczasowej ewolucji usług społecznych, to można ją przedstawić w formie listy najczęściej wskazywanych zmian:

- zmiany podmiotowego zakresu usług społecznych: od usług opiekuńczych kierowanych wyłącznie do osób, które znajdują się w trudnej sytuacji, do usług powszechnych;
- zmiany struktur organizacyjnych i odpowiedzialności: od struktur nieformalnych (usług zapewnianych przez krąg rodziny, wspólnoty sąsiedzkie i religijne), przez formalne struktury organizacji wyznaniowych i świeckich, po formalne struktury państwowe;
- zmiany roli usługobiorcy: od usług nastawionych na pomoc, z usługobiorcą jako podopiecznym, „zdanym na łaskę” usługodawcy, przez usługi będące instrumentem aktywizującej polityki społecznej, z odbiorcą, od którego oczekuje się współodpowiedzialności i wysokiego poziomu kooperacji, po usługi „skrojone na miarę”, z usługobiorcą jako „ekspertem we własnych sprawach” i koproducentem, dysponującym także własnymi, możliwymi do zaangażowania środkami;
- zmiany roli usług społecznych w obrębie *welfare* wyrażające się w ich ekspansji oraz zróżnicowaniu. Ekspansja polega na rozszerzaniu zakresu podmiotowego i przedmiotowego usług społecznych od lat 70. XX w., zaś różnicowanie – na wielu przesunięciach w ich strukturze wewnętrznej. Dwa z tych przesunięć są najmocniej eksponowane. Pierwsze jest związane z wspomnianym już wzbogacaniem i komplikowaniem się relacji w obrębie tzw. trójkąta stosunków społecznych i oznacza przesunięcie w stronę organizacyjnych struktur mieszanych (hybrydowych) i relacji sieciowych. Drugie – to przesunięcie w strukturze ryzyk społecznych: od głównych ryzyk świata przemysłowego, po ryzyka uwarunkowane indywidualnymi sytuacjami życiowymi.

Inną perspektywę do analizy ewolucji usług społecznych wprowadzają autorzy, którzy dostrzegają w tym procesie występowanie równoległych trendów i kontrtrendów. Wskazują np., że obok trwającego od lat trendu do uzawodowienia i profesjo-

nalizacji² usług społecznych, znacznie wzrasta udział osób o niskich kwalifikacjach, wolontariuszy czy służby zastępczej (w Niemczech), zwłaszcza w świadczeniu usług opiekuńczych. Dążeniu do uniwersalizacji działań i standaryzacji działań towarzyszy otwarcie na sytuacyjne wyjątki w poszczególnych przypadkach (indywidualizacja). To samo można powiedzieć o tendencji do upaństwowiania usług społecznych w ogóle (aż po traktowanie ich jako zaskarżalne świadczenia gwarantowane) i równoczesnej prywatyzacji niektórych segmentów (np. w obszarze usług medycznych i opiekuńczych)³ czy o tendencji do instytucjonalizacji usług społecznych i ich dezinstytucjonalizacji. Z perspektywy porównawczej można z kolei dostrzec dużą trwałość wybranych ścieżek rozwoju usług społecznych w poszczególnych państwach (silne powiązanie z określonym reżimem państwa opiekuńczego) przy jednoczesnym otwieraniu się systemów usług społecznych na procesy konwergencji, inicjowane przez Unię Europejską.

Wielu autorów podręcznika podejmuje próby objaśnienia przyczyn takiego, a nie innego przebiegu ewolucji usług społecznych. Najczęściej odwołują się do uwarunkowań o charakterze demograficznym (starzenie się społeczeństwa, zmiany w strukturze rodzin i w relacjach wewnątrzrodzinnych, migracje). Wskazują też, że rozwój usług społecznych pozostaje w ścisłym związku czasowym z teoriami państwa opiekuńczego. W efekcie, w instytucjonalnej strukturze usług państw europejskich „swoją ślad mógł zostawić każdy z czterech podstawowych dyskursów” (s. 34). Jednocześnie „żaden z dyskursów z tworzącymi go wartościami, przekonaniami i ofertami nie objawia się bezpośrednio i w całości jako koncepcja działania określonej polityki. Nie jest i nie będzie również jedynym określającym przyszłość usług społecznych, i odwrotnie – żaden nie może być uznany za nieistotny i przestarzały” (s.34–36). W obecnym zróżnicowaniu widoczne są więc „narodowe konfiguracje systemów usług społecznych” (s. 150).

Poza oceną dotychczasowego rozwoju usług społecznych, autorzy podręcznika podejmują także próbę odpowiedzi na pytanie o ich przyszłość. Warto nadmienić, że również w tym kontekście pojawiają się wątki definicyjne. Stawiane są mianowicie pytania o trwałość (niezmiennność) tych cech usług skierowanych na osoby, które dotąd odróżniały je od innych usług. Są to m.in. pytania o to:

- czy nowoczesne technologie mogą częściowo unieważnić (czy już tak się nie stało?) zasadę *uno actu*, znosząc jej dotychczasowe ograniczenia czasowe i przestrzenne, otwierając przy tym nowe możliwości koordynacji procesów produkcji i konsumpcji usług społecznych;
- jak dalece bezpośrednie (dotąd) interakcje między wytwórcą a odbiorcą usług mogą być zastąpione przez formy komunikacji medialnej;

² Profesjonalizacja usług społecznych rozumiana jest jako oparcie działań na praktycznych naukowych podstawach z zakresu medycyny, socjologii, psychologii czy pedagogiki.

³ Nie bez znaczenia jest starzenie się społeczeństw, które zwiększa generalnie zapotrzebowanie na usługi, ale przy tym charakteryzuje się wzrostem prywatnego potencjału konsumpcyjnego ludzi starych. Historycznie rzecz ujmując, nie mieli oni dotąd takiej siły rynkowej, jaką mają dziś.

- czy obecny, nieindustrialny model regulacji czasu pracy i organizacji pracy w usługach pozostanie (powinien pozostać?) formą uznaną za optymalną i historycznie niezmienną. Szczególnie ważne jest pytanie o potrzebę/możliwość standaryzacji usług społecznych, tak ze względu na nowe technologie, wielosektorowość usługodawców, jak i proces integracji europejskiej.

Generalnie rzecz biorąc, punktem odniesienia do konstruowania ewentualnych scenariuszy są wybrane koncepcje teoretyczne, najczęściej koncepcje społeczeństwa usługowego. Autorzy podkreślają, że centralna teza tego podejścia (sformułowana przez Jeana Fourastié), mówiąca o stale rosnącym zatrudnieniu w usługach i rosnącym zapotrzebowaniu na usługi („kolektywny głód usług”), jest dla jednych wizją optymistyczną, zapowiedzią korzystnych jakościowo zmian prowadzących do społeczeństwa nowego typu, dla innych – wizją pesymistyczną, z zagrożeniem, które m.in. niesie tzw. choroba kosztów.

Innego rodzaju objaśnienia dotyczące trendów w rozwoju usług społecznych oraz przesłanek do projektowania ich przyszłości można odnaleźć w rozdziałach, których autorzy odwołują się do teorii indywidualizacji i modernizacji refleksyjnej. Wynika z nich, że w zindywidualizowanym społeczeństwie ryzyka, w którym jednostka ma więcej możliwości wyboru, ale też ponosi większą odpowiedzialność za własne decyzje, zapotrzebowanie na usługi społeczne będzie rosło. I to nie tylko dlatego, że będą one musiały pomagać „podnieść się” tym jednostkom, które popełnią błędy, ale przede wszystkim dlatego, że rolą usług społecznych będzie wyposażenie jednostki w odpowiednie kompetencje umożliwiające jej samodzielne kreowanie „polityki życia” (*life politics*).

Osobny wątek w tworzeniu scenariuszy rozwoju usług społecznych to kwestia wpływu integracji europejskiej na ich przyszłość. W związku z inspirowaną przez UE tendencją do ponadnarodowego otwarcia rynku usług społecznych (czemu towarzyszy presja na ich standaryzację) pojawia się np. pytanie, czy silne obecnie w Niemczech lokalne i obywatelskie zakorzenienie usług społecznych stanowi przeszkodę (dowód zapóźnienia) czy też wartość, którą należy chronić? To pytanie ma znaczenie również dla polskiego czytelnika, ze względu na rolę, jaką w realizacji usług społecznych pełni w Polsce samorząd terytorialny, i ogólną aprobatę idei budowania sieci wsparcia na bazie lokalnego kapitału społecznego.

Szczególnie cenne w tych fragmentach analiz, które dotyczą przyszłości, wydaje mi się to, że odwołanie do koncepcji teoretycznych służy autorom przede wszystkim do podkreślenia, iż scenariusze przyszłego rozwoju usług społecznych nie są dziejowo zdeterminowane. To, który scenariusz stanie się faktem, jest sprawą wyboru politycznego. „Polityka wobec usług społecznych nie ma jednego charakteru, jest pełna konfliktów i sprzeczności, daje tym samym szansę różnym projektom” (s. 37).

Lektura całego podręcznika umożliwia wydobycie także innych – niż omówione wyżej – warstw analizy. Szczególnie inspirujące są, ułożone w kilku rozdziałach, rozważania poświęcone związkom kategorii „usługi społeczne” z innymi kategoriami teoretycznymi, np. takimi, jak: dobro publiczne, *governance*, opieka/care, zarządza-

nie przypadkiem. Można też z różnych rozdziałów wybrać i złożyć w odrębną całość wszystkie zawarte tam informacje natury diagnostycznej, dotyczące praktyki usług społecznych w Niemczech, tj. swoistości stosowanych rozwiązań i bieżących problemów, np. kulturowo i politycznie uwikłanego sporu o to, co jest lepszym wyjściem: rozwijanie instytucjonalnych usług opiekuńczych dla dzieci do lat trzech czy pozostawienie dzieci w tym okresie pod opieką matek, wspieranych finansowo. Zgodnie z sugestią zawartą w tytule książki, problemy usług społecznych w Niemczech służą przede wszystkim jako przykład – ilustracja do rozważań o uniwersalnym charakterze.

Podstawową cechą i wartością podręcznika jest – w moim przekonaniu – jego wielowarstwowość (są tam pomieszczone koncepcje teoretyczne, kwestie instrumentalno-instytucjonalne, rozważania o charakterze aksjologicznym, konteksty kulturowe) i interdyscyplinarność (wykorzystywany jest – choć w różnym zakresie – dorobek nauk ekonomicznych, socjologii, politologii i nauk o zarządzaniu). Cenne jest także zastosowanie przede wszystkim ujęcia problemowego zamiast opisowego, akcentowanie spraw dyskusyjnych, alternatywnych stanowisk oraz pozostawianie otwartych pytań. Mam jednak świadomość, że te cechy podręcznika stawiają jednocześnie bardzo wysokie wymagania studentom jako jego odbiorcom. Ze względu na „gęstość” treści podręcznika, należy z pewnością zaliczyć go do tych, których nie odkłada się definitywnie po lekturze, ale powraca się do nich wielokrotnie.

Mirosław Książkowski
Instytut Polityki Społecznej
Uniwersytet Warszawski

Czy Polska może podążać nordyckim szlakiem?

W. Anioł, *Szlak Norden. Modernizacja po skandynawsku*,
Warszawa 2013, IPS UW, Dom Wydawniczy Elipsa, 277 s.

Tytułowy „szlak nordycki”, któremu Włodzimierz Anioł poświęcił swą książkę, w odczuciu jednych wiedzie do kompleksowego systemu opieki państwa nad obywatelem od „kolebki do grobu”, drugim kojarzy się z „drogą do poddaństwa” (*the road to serfdom*) i istotnego zakłócenia mechanizmów funkcjonowania gospodarki wolnorynkowej. Odpowiedź na pytanie postawione w tytule tej recenzji może oczywiście interesować tylko tych, którzy opowiadają się za tą pierwszą perspektywą. Zwolennicy nieskrępowanej wolności indywidualnej i mechanizmów rynkowych z założenia kwestionują już sam sens jakiegokolwiek wędrówki tym szlakiem.

Sądzę, że książka W. Anioła powinna zainteresować zarówno tych pierwszych, jak i drugich. Autor stara się w niej bowiem o bardzo obiektywne spojrzenie na omawiane zagadnienia, nie tylko prezentując przyjęte w krajach nordyckich sposoby rozwiązywania poszczególnych kwestii i problemów społecznych, ale także zapoznając czytelnika z różnymi – często przeciwstawnymi – ocenami zachodzących w nich procesów. Ten obiektywizm jest szczególnie widoczny w formułowaniu odpowiedzi na postawione przez autora liczne pytania, które dotyczą w zdecydowanej większości zagadnień podejmowanych w rozważaniach i dyskusjach o nordyckim modelu rozwoju. W. Anioł stara się nie narzucać czytelnikowi swoich opinii, bardzo ostrożnie ważąc racje przemawiające za różnymi interpretacjami polityk prowadzonych w Skandynawii.

W książce można wyróżnić dwa główne wątki, które w dużej mierze odpowiadają jej tytułowi i podtytułowi. Pierwszy z nich – szlak Norden – to charakterystyka

genezy, ewolucji, specyfiki i przyszłości nordyckiego modelu *welfare state*, analizowanego nie tylko z perspektywy polityki społecznej, ale znacznie szerzej, jako „fenomen społeczno-ekonomiczny” (s. 9). W rozważaniach poświęconych tym zagadnieniom – zawartych przede wszystkim w rozdziałach I i VII, a po części w rozdziale VI – można znaleźć również wiele informacji na temat uwarunkowań decyzji o wyborze ścieżki rozwoju, którą autor nazywa „szlakiem Norden”, pokazujących także, w jakiej mierze uwarunkowania te mają wyjątkowy charakter, co może w dużym stopniu determinować możliwości wyboru podobnego „szlaku” przez inne kraje.

Znacznie więcej miejsca autor przeznaczył na charakterystykę „modernizacji po skandynawsku”. W tym celu wybrał cztery obszary, w których prowadzone przez poszczególne kraje nordyckie działania budzą szerokie zainteresowanie na świecie, stanowiąc najlepsze przykłady tzw. dobrych praktyk, nie tylko wartych naśladowania, ale już obecnie na coraz większą skalę wpływających na kształt rozwiązań przyjmowanych przez inne państwa. Nordyckie odpowiedzi na wyzwania demograficzne i te związane z równouprawnieniem kobiet i mężczyzn autor scharakteryzował na przykładzie szwedzkiej polityki rodzinnej. Z kolei prezentacja duńskiej koncepcji „elastycznego bezpieczeństwa” (*flexicurity*) pozwoliła przedstawić rozwiązania mające obecnie chyba największy wpływ na kierunki polityk rynku pracy w Europie. W odrębnym rozdziale opisano przyjętą w Finlandii strategię budowy społeczeństwa opartego na wiedzy, która w ciągu zaledwie kilku ostatnich dekad uczyniła mieszkańców tego kraju jednymi z najlepiej przygotowanych na świecie do sprostania współczesnym wyzwaniom związanym z postępem naukowo-technicznym. Ostatni rozdział – należący do tego wątku charakteryzuje nordyckie – w tym przede wszystkim norweskie – inicjatywy mające na celu tworzenie bardziej sprawiedliwego ładu światowego i złagodzenie konfliktów między poszczególnymi krajami.

W drugim wątku mieści się częściowo również rozdział VI, w którym autor stara się wskazać „sekrety skandynawskiej modernizacji”. Jest to – moim zdaniem – najciekawszy rozdział całej pracy, którego lektura skłania do udzielenia przeczącej odpowiedzi na pytanie postawione w tytule tej recenzji. Rozważania zawarte w tym rozdziale nieodparcie przywodzą na myśl dokonujące się w Polsce w ciągu ostatnich 25 lat procesy transformacji i jednoczesnej modernizacji. W wyniku konfrontacji doświadczeń polskich i nordyckich nasuwa się oczywisty wniosek, że ani jeden z pięciu głównych czynników, które W. Anioł uważa za kluczowe dla wyjaśnienia pomyślnego przebiegu modernizacji nordyckiego modelu rozwoju, nie towarzyszy w wystarczającym stopniu dokonującym się w Polsce przemianom.

Nie będę zdradzał, jakie to „sekrety” miał na myśli autor. Zainteresowanych odsyłam do lektury książki. Wspomnę tylko o jednej sprawie, która może pomóc w poszukiwaniu przyczyn wielu trudności i niepowodzeń w transformowaniu ustroju politycznego, społecznego i gospodarczego oraz w unowocześnianiu Polski. W swoich rozważaniach W. Anioł rozpatruje nordycką modernizację w kategoriach Schumpeterowskiej idei konstruktywnej destrukcji. Kraje nordyckie – w przeciwieństwie do Polski – potrafiły włączyć w procesy modernizacji także tych obywateli, których

określa się mianem „przeegranych” w wyniku dokonujących się zmian. Stało się tak dzięki – jak zauważa autor – „tworzeniu struktur i regulacji stabilizujących sytuację społeczną, zapewniających ludziom odpowiednie poczucie bezpieczeństwa” (s. 191).

Ta ostatnia konstatacja pozwala jednak nieco bardziej optymistycznie spojrzeć na możliwość wykorzystania doświadczeń krajów nordyckich w procesie polskiej transformacji. O ile bowiem w miarę wierne podążanie Polski szlakiem Norden jest – przynajmniej w mojej opinii – niemożliwe, o tyle nic nie stoi na przeszkodzie, by skupić się obecnie na poszukiwaniu i wprowadzaniu w życie rozwiązań, które pozwolą w jak największym stopniu ograniczyć rozmiary wykluczenia społecznego związane z procesami transformacji i modernizacji.

Konkludując, lektura recenzowanej książki zadowoli z pewnością zarówno tych czytelników, którzy są zainteresowani opisem rzeczywistości, jak i tych, którzy chcą poznać uwarunkowania danego stanu rzeczy, pytają o możliwe lub pożądane kierunki przemian, o skuteczność konkretnych działań w rozwiązywaniu pewnych problemów. Przede wszystkim jednak jest to lektura dla tych, którzy oczekują nie tyle gotowych odpowiedzi, ile raczej informacji o występujących problemach i sposobach ich łagodzenia, a także zróżnicowanych ocen funkcjonowania poszczególnych programów działania i całych polityk. Innymi słowy, jest to książka dla tych, którzy szukają inspiracji, którzy chcą zdobyć wiedzę umożliwiającą wyrobienie sobie własnego zdania w konkretnej sprawie.

Dobra znajomość specyfiki nordyckiego modelu rozwoju i duża erudycja z całą pewnością pozwoliły autorowi sprostać wszystkim tym oczekiwaniom. Zaletą książki jest też jej język oraz sposób prowadzenia narracji, dzięki czemu czytelnicy mogą podążać „szlakiem Norden” z zaciekawieniem, bez trudu i z prawdziwą satysfakcją.