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THE DEMOGRAPHIC CONDITIONINGS BEHIND THE SOCIAL POLICY IN POLAND

1. Introduction

The new elements in the demographic situation of Poland, on the threshold of the 21st century, incline to giving many-sided considerations to consequences which they can entail as regards different areas of the socio-economic life of the country. The transformations appearing in the spheres of fertility, matrimonial life, mortality, or spatial mobility are – in fact – occurrences of fundamental significance both in the lives of individuals and in the functioning of larger communities. Being born and dying determine the frames of each individual's life, yet they also condition the occurrence of other events such as contracting marriages, disintegration of marriage, migrations, which – in consequence – influences the number and structure of population.

2. The social effects of demographic waving

The changing number and structure of population (especially in terms of the age) are not indifferent from the point of view of chances of future development, as well as current and future needs as regards education, labor market, health care or social security.

In the conditions of Poland, due to the two global wars which swept through the European Continent, we had and still have to cope with waving of the number of each age-group; this waving strengthens or weakens the occurrence of various social problems in dependence on the phase of life which the particular age-group of a demographic boom or depression enters. The great fluctuation in the birthrate evokes long-term effects and enforces adjustment of organi-

zational and financial actions in different institutions of social infrastructure such as kindergartens, school, colleges of higher education, hospitals, houses of care [Okólski, Fihel, 2006].

In the perspective of the year 2030 one can enumerate the following most important consequences of the waving to date: rapid growth in the number of people available for work, acceleration of the process of aging of the Polish society, a drop in the number of the population in the country, shrinking resources of labor and a decrease in the number of women able to give birth to children.

The rapid increase in the number of people at the post-available-for-work age in the years 2010–2020 will accelerate the process of aging of the Polish society since at this time persons born in the period of the demographic boom of the 1950s will be crossing the threshold of old-age. This will result in a peculiar “boom” of, first, sexagenarians in 2010, and then octogenarians in 2030 (Fig. 1).

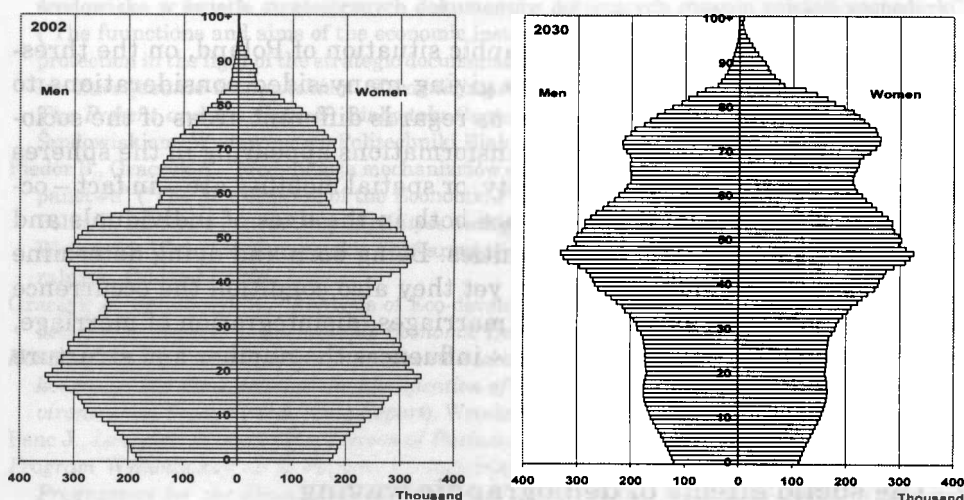


Fig. 1. Population according to age and gender in 2002 and 2030

Source: *Podstawowe informacje o rozwoju demograficznym Polski do 2004 roku (The Basic Information on the Demographic Development of Poland Until 2004)* http://www.stat.gov.pl/dane_spol-gosp/ludnosc/stan_struk_teryt/2004/31_XII/analiza.doc

The number of the population at the age of 60/65 and over will have reached 9.6 million, that is it will have increased by over 60% in relation to the year 2002. It is prognosticated that the number of people of 85 years of age and over will have risen from 329 thousand in 2002 to 780 thousand in 2030. At the same time the number of centenarians will have grown by five times, up to over 9 thousand people.

The acceleration of the process of aging of the Polish society is illustrated by the rise in the percentage of elderly people (the post-available-for-work age – 60/65 years of age and older) from 15.1% in 2002 to 27% in 2030. Such a fast growth in the number and percentage of elderly people in society, including those much advanced in age, determines the size of the needs as regards medical services, social aid in everyday functioning of households, as well as institutional care in houses of care (Fig. 2).

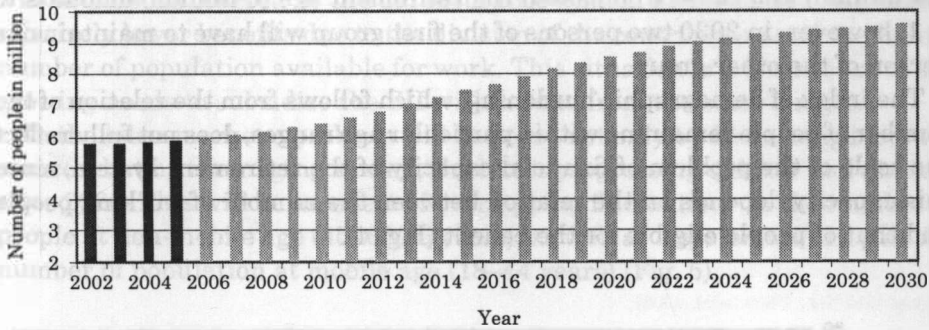


Fig. 2. Number of people at the age over 60/65

Source: see Fig. 1

The number of people available for work will have been increasing in Poland only by 2010 due to the fact that the age-groups of the demographic boom of the turn of the 1970s and 1980s will be entering the labor market. After 2010, the labor resources will have started to decrease to the level of about 21 million in 2030 (Fig. 3).

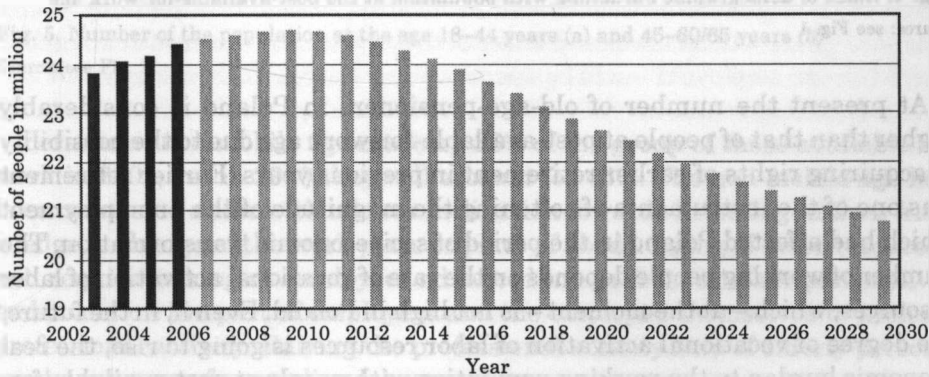


Fig. 3. Number of people at the age of 18–60/64

Source: see Fig. 1

The year 1983 was characterized by the highest birthrate (723 thousand); the successive years saw the birthrates decreasing until 2003 (351 thousand), hence after 2002, there will be fewer and fewer 18-year-olds available for work in the labor market. The decrease in the labor resources by about 15% until 2030 will require a high rate of rise in labor effectiveness in order to maintain functioning of the economy. This will also be burdensome to working people who will have to bear costs of maintenance of those at post-available-for-work age. At the moment the relations between the population available for work (24 million) and those who passed the retirement age (6 million) amounts to 4: 1; however, in 2030 two persons of the first group will have to maintain one person of the other group.

The index of demographic burdening, which follows from the relation of the number of people remaining within particular age ranges, does not fully reflect the scale of the problem of financial capacity of the retirement system, since this capacity depends on the relation between the number of working people and that of people eligible for the benefit (Fig. 4).

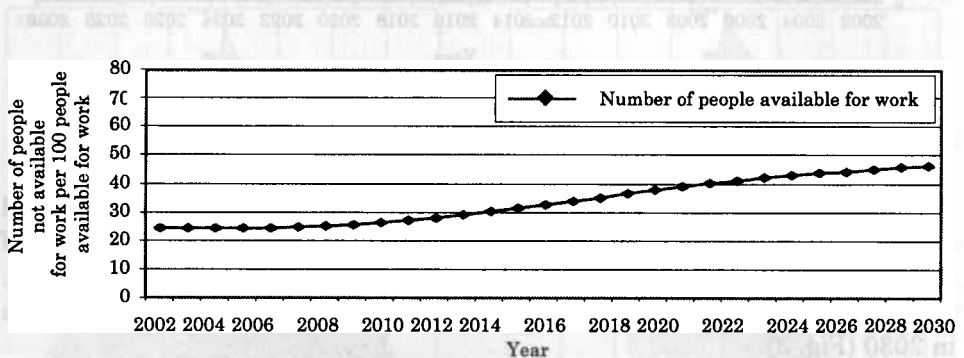


Fig. 4. Index of demographic burdening with population at the post-available-for-work age

Source: see Fig. 1

At present the number of old-age-pensioners in Poland is considerably higher than that of people at post-available-for-work age due to the possibility of acquiring rights of earlier retirement in previous years. Earlier retirement was one of the instruments of softening the magnitude of the unemployment which had affected Poland in the period of socioeconomic transformation. The number of working people depends on the rate of vocational activation of labor resources, which – at the moment – is not high in Poland. Even if, in the future, the degree of vocational activation of labor resources is going to rise, the real economic burden to the working population with people at post-available-for-work age will be much higher than it follows from the demographic burdening index [Dybowska, 2004].

The financial problems of the Social Insurance Institution (SII) are conditioned not only by changes in the age structure of the population of Poland – worsening of the relation between the number of working population and that of people acquiring the rights of retirement, but also by the reform of the very system of retirement insurance itself, which introduced the principle of division of retirement contributions between the SII and Open Retirement Funds. In this situation, the SII will be obliged to pay out the benefits to the fast growing number of old-age-pensioners, among whom the dominant part will be persons covered by the old insurance system and who will be granted relatively lower benefits due to the division of the contribution and the falling number of population available for work. This situation is a forerunner of the growing needs to subsidize the SII with means from the state budget.

In the labor market a problem will be posed not only by decreasing labor resources, but by their aging as well, the latter progressing quicker and quicker after 2020. This will be an effect of overlapping fluctuations in the number of people at non-mobile age (45–60/65 years), as well as a systematic drop in the number of population at mobile age (18–44 years) (Fig. 5).

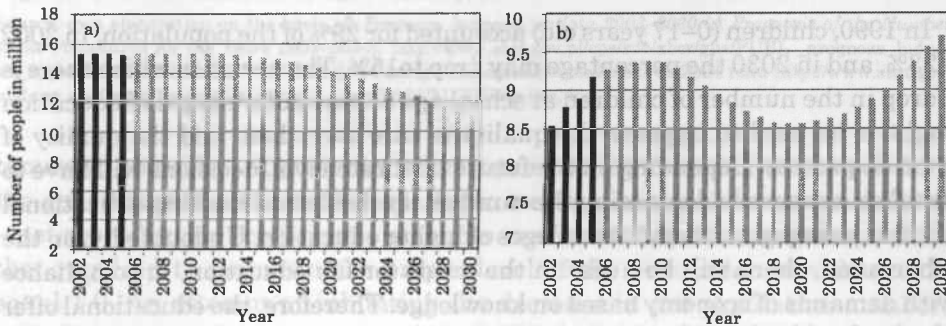


Fig. 5. Number of the population at the age 18–44 years (a) and 45–60/65 years (b)

Source: see Fig. 1

Persons at non-mobile age made up 36% of the group of those available for work in 2002, yet in 2030 they will account for 45%. The non-mobile age has been connected so far with a lower inclination towards investing in their knowledge, a change of the work place or place of abode. Aging of labor resources will require looking at employees advanced in age from another perspective, endeavors on the part of employers and the employed themselves to prolong professional activity. Raising the professional activity rate of elderly persons can be a source of expanding labor resources.

The process of society's aging has also been caused by changes on the level of birthrate. The depression in this sphere, which occurred in the 1990s,

leads to a decrease in the share of children in the total number of the population (Fig. 6).

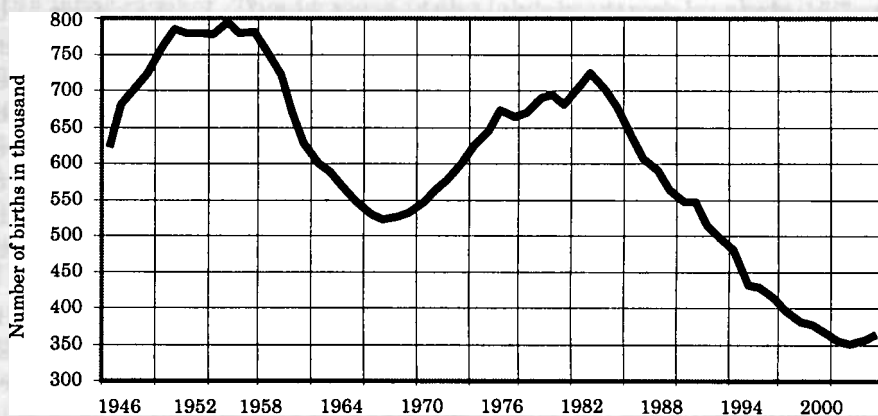


Fig. 6. Number of sustained births in the years 1946–2005

Source: [Sokółski, Fidel (eds), 2006]

In 1990, children (0–17 years old) accounted for 29% of the population, in 2002 – 23%, and in 2030 the percentage may drop to 15%. The period in which there is a drop in the number of children at school age at particular stages of education ought to be used to improve the quality of care over them and the quality of didactic process. Depending on the future birthrate level, decisions will have to be taken as regards decreasing the number of schools and limiting educational offer on pedagogical majors at colleges of higher education. Undoubtedly, on the other hand, there will be a rise in the needs for life education, in compliance with demands of economy based on knowledge. Therefore, the educational offer of schools of higher education should include requirements of not only young students (there will be fewer and fewer of those), but also the ones at advanced age, who – as employees – will be encouraged to stay in jobs for longer.

In the coming years, the fall in the number of the population in Poland will be tied to a decrease in the number of women able to give birth to children (Fig. 7).

The number of women at the age that makes it possible to secure the proper process of exchange of generations will be lower and lower. At the same time the age structure will change to the disadvantage of the share of younger women. After 2010, the age-groups of the demographic depression of 1990–2004 will be entering the reproductive age. By 2030 the number of females at the age of 20–24 and 25–29 will have lowered by almost 50% in comparison with 2002. This will be of dramatic consequence to the future birthrate level, which is predicted below 300 thousand a year, while the death rate will exceed 400

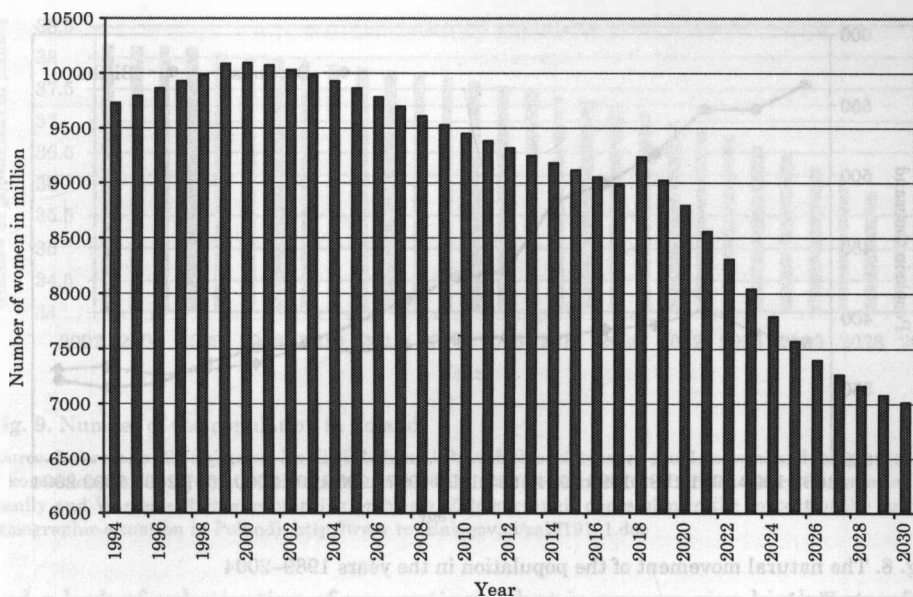


Fig. 7. Number of women at the age of 15–49 years

Source: own elaboration on the basis of: *Prognoza ludności na lata 2003–2030 (A Prognosis of the Number of the Population for the Years 2003–2030)*, http://www.stat.gov.pl/cps/rde/xbcr/gus/PUBL_progniza_ludnosci_1_polska.xls; Podstawowe informacje o rozwoju demograficznym Polski do 2004 roku http://www.stat.gov.pl/dane_spol-gosp/ludnosc/stan_struk_teryt/2004/31_XII/analiza.doc

thousand annually. At present the girl generation in Poland is 40% lower than the generation of mothers; the synthetic measure of population reproduction – net reproduction coefficient – amounts to about 0.6 and is much lower than that required to maintain the proper level of the population, which should equal 1.0. An attempt at inhibiting the decrease in the population number, as well as aging of our society, requires a considerable rise in the number of births. For this reason the family model 2+2 is insufficient, bearing in mind that the number of young women is becoming lower. Therefore, the fact that age-groups of the demographic boom of the 1980s are at the age that is most suitable for starting families and giving birth to children, should be taken advantage of already at the moment, as it will be by 2010 only that the number of women at the age 20–34 years will still have been growing.

3. The demographic changes in Poland in the years 1990–2006

In recent years the number of the Polish population has been diminishing (Fig. 8). The year 2006 was the eighth successive one in which the real shrinkage of the population occurred [Stańczak, Waligórska, Nowak, 2006].

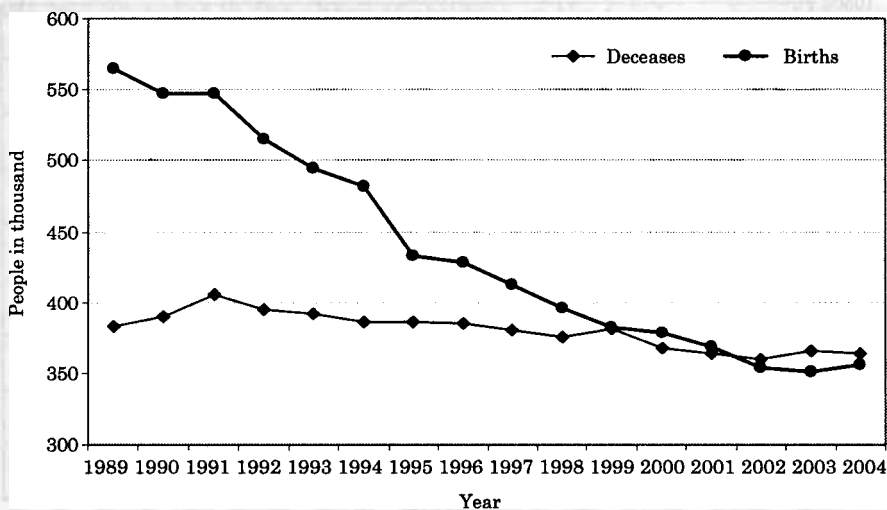


Fig. 8. The natural movement of the population in the years 1989–2004

Source: see Fig. 1

In 2002, for the first time in the demographic development of Poland, there had been recorded a negative birthrate, *i.e.* the number of deaths exceeded that of births (Fig. 8). The demographic prognoses until 2030 predict a further drop in the population number in Poland (Fig. 9). These are new phenomena which revealed at the time of carrying out changes in the principles of functioning of the economy and being in authority, referred to as transformation of the socioeconomic system. The transformation of the system meant shock changes to the people's living conditions. The new rules of economy's functioning, including those relating to the labor market, triggered important factors of economic nature, not indifferent from the point of view of decisions to start or enlarge the family: on the one hand – uncertainty about the future (risk of losing work); on the other one – growing requirements as regards qualifications, which forces the young to continue education on higher and higher levels. Factors of cultural nature, *i.e.* what is called "lifestyle" are not marginal ones either in periods of rapid transformations [Dybowska, 2005b]. Furthermore, Poland's opening to the world does not entail merely a free flow of goods or money, but also promotes a flow of information and – to a greater and greater extent – an increased possibility of traveling and a stronger and stronger influence of life patterns of highly developed societies. It is hardly possible for a collection of such conditionings not to exert any influence on the demographic processes, which – as a matter of fact – are not autonomous in relation to the socioeconomic situation.

Thus, at the time of the socioeconomic transformation, Poland found itself in a completely new demographic situation, marked out by a negative birthrate

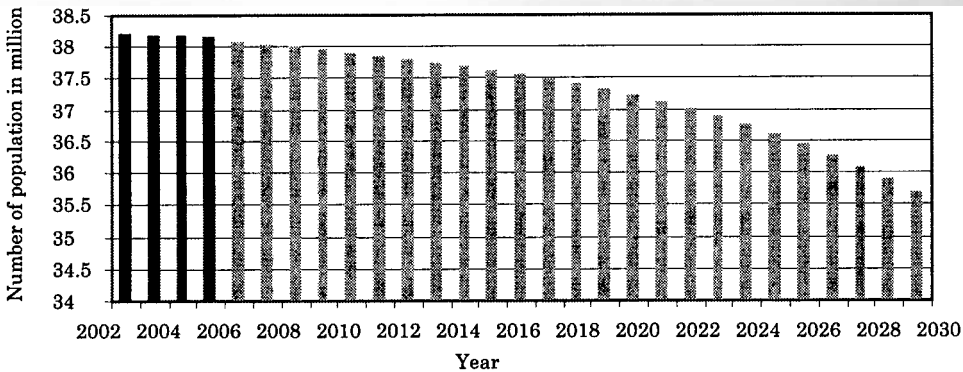


Fig. 9. Number of the population in Poland

Source: Informacja dla Sejmowej Komisji Rodziny i Praw Kobiet dotycząca problemów nizu demograficznego w kontekście aktualnej sytuacji demograficznej Polski (Information for the Parliamentary Commission for Family and Women's Rights, concerning problems of demographic depression in the context of the current demographic situation in Poland), http://www.rodzina.gov.pl/za/f191_1.doc

and a lack of substitution of generations, that is women give birth to too few children to maintain the number and structure of the population on the unchanged level. For a simple replacement of generations to occur, the index of theoretical number of children per a family should amount to 2.1 – in 2002, in Poland, it equaled 1.22 and appears to be one of the lowest in the world (Fig. 10).

The decrease in the number of births in the 1990s should be connected with the decreasing tendency among the young Poles then to contract marriages.

The number and intensity of entering into marriages decreased dramatically especially within the age range which has been considered the most suitable to do so to date, *i.e.* 20–29 years old. Since 1993 there has been a negative balance of marriages, that is the number of contracted marriages has been not sufficient to compensate for the number of those dissolved because of decease of one of the spouses or in consequence of divorce. In the years 2000–2006, the number of divorces grew rapidly from the level of about 43 thousand to 73 thousand. As a result, the number of already active marriages is shrinking and the structure of families is changing. Although the dominant type of the family is still one with children, such families accounted for 56% of all families in 2002, whereas in 1988 – 61.8%. The number and share of incomplete families is growing rapidly – single mothers and fathers made up 19.4% of all families in 2002 (in 1988 – 15.4%) [Kowalska, 2003].

It is not only that the number of existing marriages is getting smaller, but this is limiting the number of off-springs: in 2002, the most numerous category among marriages with children were those with one child (42.5%), while – as late as 1988 – the highest number were marriages with two children (43%).

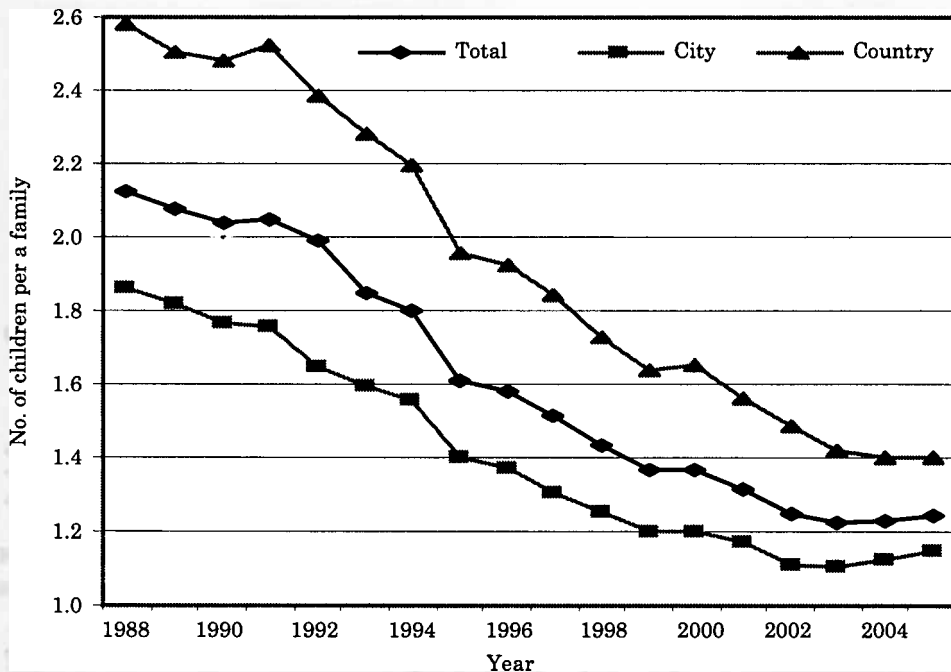


Fig. 10. Theoretical number-of-children-per-a-family index

Source: see Fig. 6

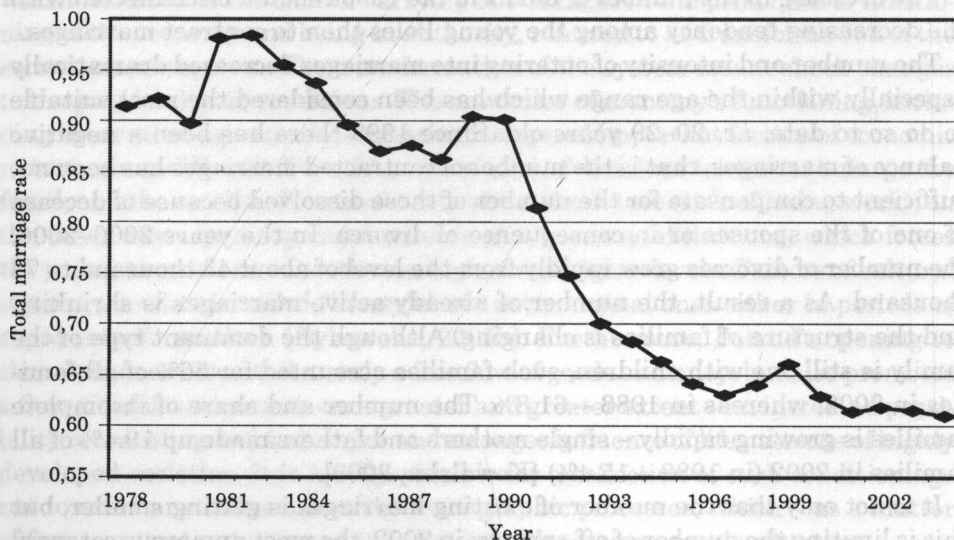


Fig. 11. Total marriage rate (women's first marriages)

Source: see Fig. 6

In several recent years which saw the transformation of the socioeconomic system, a change in the pattern of marriage and fertility has been observed: the average age of women and men contracting marriage has risen; so has that of women giving birth to children, including those having their first child. The rising age of those contracting marriage and giving birth to children proves that the decisions are postponed until later in lives, which – in consequence – will lead to a lower realized number of children per one family.

The lower marriage rate (6.75% in 1990; 5.0% in 2004) signals that informal unions are becoming more and more important. Although the census of 2002 recorded about 200 thousand of partnership unions (*i.e.* 1.9% of all families), since 1990 the number of children born in such unions has been increasing rapidly; so has the share of such births in the total of births (from 6–7% at the beginning of the 1990s to about 20% in 2005; still it is worth mentioning that there are regions of Poland where the percent of births outside formal marriages exceeds 30%).

The demographic problems with which we will have to deal in the year 2030 – aging of the society and decreasing number of the population in Poland – are caused by the rapid fall in the birthrate within several recent years. The former is additionally influenced by the positive tendency towards prolonging life of both women and men. Further prolonging of life expectancy is prognosticated for women – from 78.8 years now to 83.3 years, and for men – from 70.4 years to 77.6 years, respectively.

The key demographic factor of the future development of Poland will be the birthrate level, which will depend on fixation and depth of the changes occurring in the process of formation and disintegration of the family including the following: a weaker inclination towards contracting marriages, getting married at a later age, a rise in the number of births outside formal marriages, an increase in the number of separations and divorces, a growth in the social acceptance of co-habitation, an increase in the number of childless people by choice. It is in such alterations that demographers perceive the sources of the demographic problems of the European countries – the lack of substitution of generations, threats of depopulation – in compliance with the concept of the second demographic transition.

Results of sociological research can testify to the fact that the decreasing number of contracted marriages and children being born in Poland is – first of all – a reaction against very hard material conditions (unemployment, poverty), and not an effect of deep transformations in the sphere of values, norms and attitudes, referred to as post-modernity [Dyczewski, 2003; Ciechański, 2006].

The depression recorded in the birthrate is a fact though, the consequences of which will be felt by – at least – one generation, or even longer, if the trend of declining birthrate is not reversed.

4. Directions of actions taken within the social policy

Within the social policy realized in Poland one should distinguish two vital areas: the first closely connected with a strategic factor, from the point of view of the future development of Poland, *i.e.* the birthrate level; the other including problems resulting from changes in the age structure of the population, *i.e.* the process of aging. Each of these areas requires undertaking actions already today, however much it is enforced by different reasons: in the first area – resulting from the fact that positive effects in the labor market may not be felt until about 20 years from now; in the other one – they are connected with the fact that it is already today that the number of elderly people is rising.

Actions taken in view to strengthening the trend towards raising the birthrate in Poland should be accompanied by legal protection and financial support granted to families rearing their children. It is worth observing here that strengthening families with many children and those multi-generation ones contributes to soothing problems connected with securing aid and care to people at older age. If tendencies towards having fewer children, or even those towards childlessness, are deepening, then older people will be bound to look for mainly institutional forms of care. Such aid is more expensive, though, than that offered by the family. Therefore experts dealing with consequences of the process of aging of highly-developed societies stress the necessity of changing the attitude of the young generation towards the family, which – in a way – means going against the current of post-modernity.

Evaluations of the effectiveness of the pro-family policy realized to date in the European countries point to limited possibilities of influencing an increase in the birthrate by means of economic instruments [Ciechański, 2006]. In the conditions of Poland, one can not underestimate the hard material situation of families, especially of those which have children to maintain. Hence, the social expectations addressed to the state authorities underline the need to lower families' financial burden in relation to raising children. Indeed, this makes up a characteristic difference between the newly-admitted states and the old members of the European Union, the latter preferring labor market regulations and care-related benefits to financial grants in arranging their pro-family policies [Ciechański, 2006]. It should be expected that along with improvement in the material situation of Poland's population, direct financial benefits will become less significant; instead, solutions aiming at reasonable combining family-related and occupational duties will gain more importance. Aiding the children raising families in the form of relieving them of financial burden does not have to mean paying out financial benefits to them only – it is vital, too, that solutions within tax system should be accepted such that rearing children would be valued as an important social investment. Solutions of this kind may bring about desired effects and they open a vast area for activity

in this sphere since research shows that there is a large number of women in Poland who claim that they have fewer children than they would like to have [Ciechański, 2006]. In particular, this concerns educated women with professional aspirations. Thus, the aid offered to them, which facilitates harmonizing their family-oriented and professional careers will be of key importance.

From the point of view of solving social problems which result from the demographic changes that have occurred in Poland, the influences of rearing-propaganda character can not be underestimated since they include formation of a favorable social climate with regard to the family and motherhood. Such actions ought to include also preparation of youth for responsible parenthood, altering attitudes of employers towards women-employees who bring up children, as well towards elderly workers, preparation for dignified and active aging. Fortunately, they do not require substantial financial means, and if prepared well and realized on a systematic basis, they can lead to achieving desired, lasting and long-term effects.

5. Recapitulation

The coming years will certainly require making a great effort in order to satisfy growing needs of the aging society. Therefore, decisions relating to the socioeconomic policy can not be postponed; on the contrary, they ought to be a clear signal to the younger generations at the age which renders them available for work to tie their future lives with the mother country, to work and start their families in Poland. After 2010, there will be less and less numerous age-groups ready to enter the age that favors starting families and having children, and it is hard to foresee how big emigration will be. Considering the differences in the level of the economic development of Poland and the old EU states, it can be expected that migrations abroad will be exerting a stronger and stronger impact on the demographic situation of our country. As a matter of fact, the EU states themselves will also face more and more serious problems with their aging societies and shrinking labor resources.

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