

Responding to New Social Risks. The Southernization of Social Welfare in Poland?¹

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1 Introduction: welfare regimes and new social risks

The process of reforms and modernization of the welfare states is a perpetual one, covering adjustments to changing social and economic conditions as well as reaction to waves of criticism and related ideological and programmatic switches. Current welfare reforms promoted within the European Union countries refer to 'social investment' concept implying - as Jenson (2012) points out - reorientation of the time perspective for social policy; instead of needs, it concentrates on future profits and inter-generational returns while keeping current consumption (what means also compensatory social expenditures) on the level appropriate to assumed future returns. In a sense, it is a 'productivist' conception of welfare (Bonwin, Otto, Wohlfarth & Ziegler 2018) promoting discounting and cost-benefit type of reasoning. The perspective has its consequences though; it leads to pressure on limiting or reformulating interventions in those areas that cannot be 'discounted' what also applies to compensatory relief of current needs, and on targeting intervention on 'promising' categories. Investment perspective also emphasizes duties and responsibilities for current and future wellbeing divided and shared between individuals, families, communities, and the state, changing the understanding and scope of social rights and citizenship. Focus on the future leads for example to prioritizing children as "citizen-worker of the future", accentuating human capital of young generations, and to defining social citizenship of the adults by their obligations (Lister 2004: 160).

At the same time, social investment ideas change the perspective on welfare governance, putting an emphasis not that much on traditional, 'old' social risks like unemployment, poverty and old age, but on the 'new' ones (Esping-Andersen 2003; Taylor-Gooby 2004). Esping-Andersen (1999) stresses that 'old' welfare states were focused on social protection by supporting risk management mechanisms in three areas: within families referring to the reciprocity principle, within state-operated redistributive social security systems, and promoting the labour market policies. At present each of these areas is subject to erosion; what we are facing are processes of individualization and family transformation, deregulation of the labour market – i.e. the basic social integration lever, and globalization - which affects the scope of states' response and disrupts the coherence of national social policies (Esping-Andersen 1999). Consequently, new social risks are defined as "situations in which individuals experience welfare losses and that have arisen as a result of the socioeconomic transformations that have taken place during the past three to four decades and that are generally under heading postindustrialization"subsumed of "deindustrialization, tertiarization of employment, the massive entry of women into the labor

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force, increased instability of family structures, and the destandardization of employment" (Bonoli 2007: 498).

The authors quoted above do not agree whether the new risks are actually 'new'. For instance, Esping-Andersen focuses more on the changing patterns of major social issues claiming for example that modern poverty is not qualitatively different than the poverty in the past, but it has become more 'democratic' and detached from the social class structure; the risk of poverty currently applies also to these structural segments that were relatively stable and safe before. Still, the 'new risks' catalogue, stemming from the labour market transformation, related to demographic structures and family functions breakdowns, seems relatively coherent. It - first of all - covers problems of compromising family life and work, single parenthood, multi-child families, dependency related to age or sickness, qualification mismatches or – finally – the working poor phenomenon (Taylor-Gooby 2004). Furthermore, risks typical for the post-industrial societies are concentrated in social categories that are "not well served by the post-war welfare states" (Bonoli 2006: 8). Old-type welfare solutions do not seem to be prepared to cope with instability and uncertainty related to multifarious vulnerabilities and to differentiated 'new risks' dynamics over the lifecycle (Ranci 2010).

Reforms toward new social risks carried out under the heading of social investment concentrate on 'risk categories' mentioned above, but also introduce different redistribution patterns using social services as a major policy instrument. Instead, or in addition to universal child or family allowance, we have childcare subsidies or services targeted at low-income families, care services in addition to pensions and sickness allowances, parental leaves securing labour market flexibility, job-related training in addition to unemployment benefits, job creation instruments, and the promotion of social economy based on reciprocity - both as social and labour market reintegration instruments.

The ongoing reforms related to the evolution of risks raise questions about the nature and direction of rearrangements within national welfare systems on the one hand, and about the differentiated reaction to new social risks. Those questions have been addressed in various analyses (see e.g. Taylor-Gooby 2004, Bonoli 2007, Armingeon and Bonoli 2007, Seeleib-Kaiser 2008, Ranci 2010, Hemerijck 2013, Greve 2019), however CEE, post-transitional countries are usually taken into account to a rather limited extent. The following essay asks if welfare policy in Poland is reorienting toward new social risks, and what affects the reorientation processes. The text also asks about the nature of the Polish welfare state applying the real-typical perspective (Aspalter 2019) using modified (that is — with the 'southern model' included) Esping-Andersen's typology of welfare regimes as a point of reference. Despite of the critique of the 'three/four-worlds' approach (see e.g. Bochel 2019) the reference seems justified considering that the typology reflect — to some extent - the actual variation of response to 'new risks' (Ferragina, Seeleib-Kaiser & Spreckelsen 2014).

Existing literature suggests that CEE countries are rather distant from liberal and even social democratic welfare regimes although it is hard to identify a consistent welfare model within post-socialist block (e.g. Kuitto 2016). CEE countries supposedly share a 'hybrid' system influenced by complex, incremental paths of institutional transformation, fiscal constraints and the need of 'emergency' and crisis-driven responses during the transition (e.g. Inglot 2008, Stetter 2018, Saxonberg and Sirovátka 2019, analyses in Cerami & Vanhuysse 2009). On the other hand, it seems rather difficult to empirically locate Poland and other post-socialist countries within the 'three worlds' framework: "The problems of any kind of welfare regime classification in the region are legion. Theories of welfare regimes suggest that their

coherence is based on institutional stability, whereas the 'permanent revolution' of welfare states post-1989 in much of Eastern Europe offers a case study of anything and everything but stability" (Lendvai-Bainton and Stubbs 2021: 209). Following analysis tries to show that despite its hybridization and the state of 'permanent revolution' - the welfare system in Poland shows several characteristics of the Southern welfare regime.

In the nineties, Ferrera (1996) identified that Southern European countries share the ineffectiveness and fragmentation of the institutional support system, the persistence of political clientelism accompanied by 'excesses in income maintenance' and 'micro-corporatist solidarities', ideological polarization within the party system, high poverty clustered geographically, duality of the support system (that is - simultaneous occurrence of 'hiperprotection' of some, and 'under-protection' of other social groups or categories). Other authors pointed also at high level of social policy familialization (as an opposition to defamilialization which - as defined by Esping-Andersen, 1999:45 - "lessen individuals' reliance on the family; that maximize individuals' command of economic resources independently of familial or conjugal reciprocities") and residual character of assistance schemes related to a specific gender-oriented retrenchment traits (Martin 1996), importance of the Catholicism and religion-oriented values (Guerrero & Naldini 1997), underdevelopment of unemployment compensation and vocational training institutions, or clientelistic attitudes on the micro-level (Karamessini 2007). The thesis about the southern regime was questioned also by pointing at a gradual institutional convergence of the South towards a continental norm (Andreotti et al. 2010) or the time delay in the EU policies implementation (Karamessini 2007). Nevertheless, the thesis on the Southern European model can be used for heuristic purposes.

The text covers regularities both on the macro level, and on the 'street-level', trying also to answer the question about relations of policy changes and policy implementation on the local level, using social assistance as an example. Existing literature on new social risks concentrates more on governance issues and the 'macro' point of view and less on perspectives from the bottom. Some studies directly address social workers' attitudes toward government or social welfare policy in general and support for welfare (Weiss-Gal & Gal 2007), the professionalization of social workers (Teater & Chonody 2018; Rymsza 2012) or attitudes and perception of particular categories of clients (Kallio, Blomberg & Kroll 2013; Landmane & Renge 2010). This text address social workers' attitudes to the elements of the 'new risks' policies.

2 New risks in Poland

The level of social risks in Poland seems moderate if we look at the basic data on social protection. Income poverty has been declining in the recent years: from 6,6% in 2011 down to 5.4% in 2018 considering so-called subsistence minimum (the extreme poverty line based on the estimated amount necessary for physical survival), and from 17,6% in 2011 down to 14,2% in 2018 taking into account the relative measure of 60% income median (GUS 2019a). In both cases, indicators are lower than EU average. At the same time, poverty indicators correlate with family size, unemployment, disability, and breadwinner age (the younger, the greater the likelihood of poverty). The poverty rate is relatively low among the retired (4,6% vs subsistence minimum) – a bit lower than among those in paid employment (4,7%), which implies that state-governed contributory pension plan is currently as effective as wage employment in preventing income poverty.

The problem is not, however, related to poverty itself; low income – i.e. not exceeding 2/3 of the median - is obtained by ca. 30% of the working population, and these are far more often women and young adults (up to 30 years old). The likelihood of finding jobs in the case of long-term unemployed is decreasing, and if a job is found, it usually means joining the precarious labour market segment (Employment and social developments in Europe 2016; Nolan et al. 2011). The Household Budget Survey (GUS 2019a, 2020) as well as EU-SILC data (GUS 2021) suggest that the risk of poverty is related to household size and to the number of children, as well as to low education.. The share of employees on temporary contracts, what implies income instability, is still - although decreasing - among the highest in the European Union (24,3% of the total number of employed in 2018 and 18,4% in 2020 according to Eurostat Labour Force Survey data). The current problem of working poor and unstable employment will also lead – soon – to the "two-speed old age":

"Whilst the generation of the post-war baby boom will still benefit from the demographic dividend, the generation born in the eighties of the 20th century will not. This generation, already carrying the burden of currently paid retirement benefits and the need to save for own benefits, will pay for the demographic changes, whilst the post-war baby boom generation will live – as compared to the next generations – in relatively more favourable financial conditions" (Szweda-Lewandowska 2014: 20).

Thus, the "old" problems and risks become generational and their distribution related to the structural characteristics of households.

In the context of the ongoing welfare reforms, it is worth to examine how Poland compares to other countries regarding response to the new social risks. Here, the text repeats the analysis by Giuliano Bonoli (2006: 8–14) whose main interest was in a typology of welfare regimes in terms of coverage of the new social risks; this analysis also aims to highlight the situation in Poland against other European countries without pretence on a comprehensive comparative analysis and as a reference for presented discussion. The analysis is based on different data (mainly OECD Social Expenditure and the Family Databases) than in Bonoli's original study – the latest available for same period comparisons; it also considers Eastern Europe and the New Member States of the European Union.

Poland is among the OECD countries with relatively low social security expenditures in relation to GDP (see Figure 1), and both on active labour market programs (ALMP) and on services targeted directly to families (child-related cash transfers to families, public spending on services for families with children and financial support for families provided through the tax system). Both areas cover institutional response to the main types of the new risks mentioned before – i.e. both cover response to the labour market situation and family problems. The former amounted to 1,1% of the GDP on average between 1990 and 2013, while the latter– 0,3%. Lower values are recorded only in Lithuania, Greece, and Turkey, yet post-communist countries, Portugal, Greece and Italy form a cluster clearly separated from the 'old Europe' countries. Bonoli comments at this point, that country clustering and mutual relations of the two policy areas suggest that similar factors affect expenditures both on family services and ALMPs and that relationship can be misleading considering that in this case it strongly depends on general GDP and government spending level.

In case of Poland, the data illustrate, to some extent, the consequences of local welfare services underfunding, considering that almost all family benefits in Poland – with some exceptions means-tested - are distributed via local government structures, mainly via social

assistance centres. And according to OECD Social Expenditure Database public expenditure both on cash benefits for the working-age population and on all social services excluding health are among the lowest in the European countries. The underfunding issue and related problems with exercising citizen's social rights are also regularly mentioned in discussions on reforms of the social welfare system (e.g. Kaźmierczak 2003). On the other hand, ALMP and unemployment benefits are also the responsibility of employment offices operating on the local level, although activation programs are implemented by social assistance as well. Thus, the chart below illustrates not only the emphasis on the "new risks" but the balance between two pillars of activation policy, bearing in mind that public spending on retirement system (i.e. one the 'old' social risks) in Poland amounts to ca. 10% of the GDP.

Figure 1: Expenditure on family services and on active labour market policies. Source: OECD, own calculations

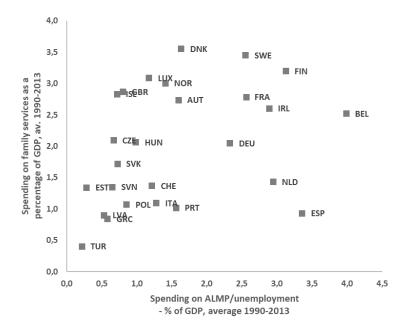


Figure 2 shows the output on new social risks policy on reconciling work and family life - i.e. effects of family benefit expenditures. It also addresses the problem of gender equity on the labour market. "Fertility gap" means the difference between the number of children women aged 15-64 would like to have and the actual number of children per woman, measuring the effectiveness of pro-natal and pro-family policies. Bonoli mentions that differences here are explained among others by access to childcare and are related to family income and care costs at the same time. His explanation sounds plausible in the Polish context due to the low average disposable incomes, higher than average poverty rate among families with children and relatively low availability of childcare (nurseries and kindergartens). According to official statistics, ca. 70% of municipalities in Poland do not provide any institutionalized childcare (Topińska 2017), and the usage of childcare services is low in comparison to other EU countries (van Lancker et al. 2015). Social distribution of childcare is also unequal – the use is higher among higher-income households, what also means that childcare use is related to gender-driven participation in the labour force (see Van Lancker & Ghysels 2014), genderbased wage inequalities and predominant traditional family model in the lower social strata. Familialization of care is strengthen considering also that the institutional childcare system is not designed for younger children, in pre-kindergarden age (see: Michoń 2010). Szelewa and Polakowski (2019: 23) indicate, that attempts to increase childcare-use after the transformation were not accompanied by stable financing mechanisms, and that devolution in this case was related to the creation of quasi-markets because of contracting-out mechanisms in childcare on the local level. In consequence of a "implicit marketization" of childcare in Poland the institutional system focuses on the middle classes and remains hardly accessible for low-income families. For Hungary and the Czech Republic the stratification effect is similar (regardless of the fact that the reform in each of the countries were based on different assumptions), and boosted by EU structural funds "used only in the form of a minimum necessary response to European calls for stronger engagement in achieving Barcelona targets" and mostly supporting "the development of childcare services predominantly used by employed women and often those with higher education" (Szelewa & Polakowski 2019: 23). As for Poland, those regularities have been strengthened after introduction of universal (at the beginning, in 2016, for families with two or more children, and starting from 2019 for all children up to 18 years of age) and unconditional child benefit "Family 500+". Studies show that labour force participation for women with two or more children receiving the benefit is currently decreasing (Magda, Kiełczewska & Brandt 2018).

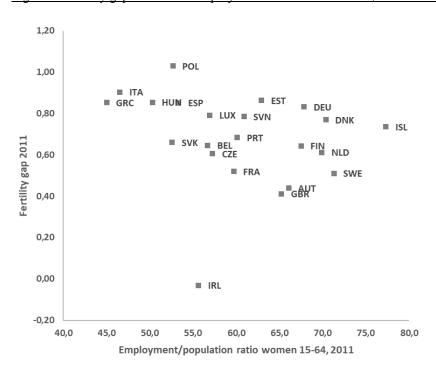


Figure 2: Fertility gap and female employment rate. Source: OECD, own calculations

Figure 3 illustrates the effectiveness of the working poor policy. The inequality index here implies the ratio between the upper limits of the fifth and first deciles of the earnings distribution. This – as Bonoli (2006: 11) suggests – "allows to capture wage inequality between the middle classes earning around the median wage, and those who are on low-paid jobs". Again, the situation in Poland on both dimensions is worse than in the 'old Europe' and close to other post-communist countries as well as to Southern Europe. From the point of view of the new risks' management, it is worth noting how the relationship between qualifications, unemployment and income affects the possibilities of activation on the difficult labour market. Yet, the problem here lies not only in income inequalities but in the level of salaries as well, which - if low – may affect whether entering the labour market is a rational alternative to the permanent benefit use. The data partly confirms the conclusions from social structure and inequalities studies concerning meritocratization of the Polish society. During political and economic transformation after 1989, the correlation between education and

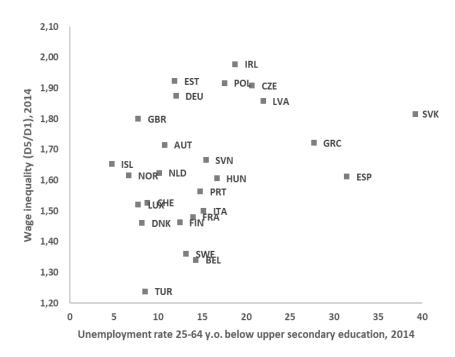
income has been relatively strong, what on the one hand signifies higher returns from education and more equal opportunities in access to education, and - on the other hand - strengthens income inequities (Poławski 2010). In other words, education provides the basic channel for social mobility, yet those who succeed in this area are more likely to gain higher position in the income hierarchy than those who do not succeed and who more often fall in the precarious labour market segment or are unemployable.

The processes of income differentiation have a class dimension, and Poland is a country where this dimension still seems to play its role (Słomczyński & Janicka 2007). What's equally important – those with relatively low education are much less resilient to labour market dynamics. Data on registered unemployment show that from the beginning of 1990s annual changes in both the number and percentage of unemployed with tertiary education are smaller independently of the overall economic situation, contrary to the same indicators for unemployed with basic and vocational education that are relatively more sensitive to recession or economic growth (Poławski 2010). At the same time, income inequalities are driven by labour market segmentation and by diversification of the secondary labour market. Percentage of those on fixed-term contracts has tripled in last decade and currently, according to OECD employment database, exceeds 24% of all wage and salary workers what - together with Spain and Portugal - places Poland on the highest position in the European Union. The problem is, however, not only in the low job and earnings stability within the 'temporary' segment, but also in its internal differentiation. Analyses on temporary jobs in Poland leads to the conclusion, that

"Two different groups of fixed-term employees may coexist: those who represent the marginal, buffer labour force trapped in short-term jobs, and those who may actually be prospective insiders on their way towards stable employment. Flexibility at the margin is achieved mainly at the expense of workers in low-status occupations, whose weaker bargaining position results from their replaceability, rather than fixed term employees in general" (Kiersztyn 2016: 892).

Considering, that the 'buffer labour force' consists mostly of low-educated and underqualified, and that in case of part-timers and those on fixed-terms contracts the access to unemployment and welfare benefits is rather restricted, the segmentation reinforces the stability of precarious segment of the social structure as well. It is worth to notice, that those processes were forced by flexicurity pressures in 2000s promoting employment security instead of job security (Patulski 2010), and that stabilization of precarity among the lower social strata is a side-effect of the workfare-like solutions. Motivating to accept short-term or temporary, low paid jobs available to the underqualified seems to be a routine in social assistance, especially in tight local labour markets (Zalewski 2018).

Figure 3: Wage inequality and low-skill unemployment rate. Source: OECD, own calculations



The above analysis, though not exhaustive, shows that within the Polish welfare system selected 'new risks' are addressed to a rather limited extent – in comparision to other EU countries and considering both expenditures and the impact on labour market activity, gender equity and reconciliation of working life and family planning. Bonoli's conclusion fifteen years ago (2006: 13) was that the tentative ranking of successful implementation of new risk policies would start with Nordic countries followed by conservative, continental welfare states, and that those policies basically do not exist in Southern European countries. A decade later data suggest that the South in this respect is close to the Central and Eastern Europe (with exception of labour market policies), that is with the new EU member states with a socialist past.

In the subsequent parts of this document, elements of locally implemented social support system and labour market policy lying behind 'new risks' policy in Poland are outlined. It will not address certain political and structural factors i.e. those shaping income inequality and financial poverty (e.g. low minimum wage, labour market dynamics, pensions etc.), or political party clientelism providing an illustration of issues related to the policy implementation, highlighting aspects that affect policy outcomes that bring Poland closer to the Southern patterns outlined above. The next part will focus on labour market policies and unemployed profiling procedure as an example of institutional structure fragmentation.

3 Labour market policy: the case of profiling

The outcomes of active labour market programs in Poland are questionable to say the least. The Ministry of Labour reports seem to be overly optimistic in this respect. E.g. efficiency of labour market policy instruments (measured in relation to the percentage of activated unemployed getting and keeping a job within the period of 3 months after completing the program) for most ALMPs exceeds 50%, and reaches ca. 90% in cases of start-up subsidies, workplace creation refunds and other business-oriented support (MRPiPS 2016b). The problem is that official data do not cover net effectiveness, displacement and substitution effects nor the situation of ALMP participants in a longer period after completing the

program. There are reasons to believe that net effects of ALMPs is much lower, and in some cases it may even be none or perverse, e.g. it could be more advisable not to participate in the so called 'socially useful works' or internships organised by the local labour offices if one hopes to have established any stable link to the labour market (Wiśniewski, Dolny & Jaskólska 2011, Wiśniewski & Arendt 2018). The studies also show that potential impact of ALMP upon employment is postponed and significantly lower for categories prone to the 'new risks' – i.e. women, young adults or participants with disabilities. Effects are strongly linked to the local labour market conditions as well (Penszko, Jakubowska & Drążkiewicz 2012).

The data also suggest that the very identification of the 'categories in particular labour market situation' (according to the Act on labour market promotion of 2004 - unemployed aged up to 30, long-term unemployed, those aged over 50, beneficiaries of social assistance, persons with at least one child aged up to 6 or at least one disabled child aged up to 18, persons with disability or sickness) does not make much sense in the Polish labour market realities. Majority of registered unemployed belong to this group (according to Ministry of Labour statistics - 83% of all unemployed in 2019) and - consequently - it is rather hard for ALMP managers to execute proper targeting procedures and prioritize individual activity plans. Also, the catalogue of 'particular situations' is not flexible enough, limits possibilities of adaptation to the individual situation of the unemployed and in result causes dropouts. It is also hard to adapt categories from the list to the specific context of particular activation programs. Doubts about the value of ALMP effectiveness indicators does not seem very surprising then – targeting in case of 'new risks' categories appear fairly superficial.

The solutions intended to facilitate interinstitutional cooperation to foster the effectiveness of activation are not rated high either. This is – among others - the case of so-called unemployed profiling. Revision to the Act on employment promotion and labour market institutions from 2014 introduced to employment offices' practice a duty of assigning all unemployed to one of three categories: either those close and ready to return to labour market, those with moderate readiness and average distance from the labour market and those who are very distant from the labour market and not ready to take employment. Persons classified to the third category, what in practice means long-term social assistance beneficiaries, were supposed and obliged to undertake the "Activation and Integration Program" (AIP) run by the employment office in collaboration with social assistance or local social economy institutions.

The profiling idea and procedures were widely criticized. First, the very idea of AIP has led to reduction of activation measures to inefficient forms of activation — e.g. public works - for unemployed considered distant from the labour market. Second, profiling process covered controversial, based on unknown algorithms and inaccurate indicators automated diagnostic procedures (Sztandar-Sztanderska & Zieleńska 2020), leading to lack of transparency and violation of empowerment rules. Profiling — due to the sanctions (a threat of losing the unemployed status and related financial benefits and, more importantly, health insurance if one refuses to undergo the profiling process or to participate in AIP) — was also perceived as a disciplinary measure leading to dropouts, reduction of activation offer in employment offices and artificial decrease of the unemployed. Third, there is evidence showing that profiling increased the risk of support uniformization in case of those in 'particular situation on the labour market'. In other words — it resulted in offering the same type of ALMP to internally differentiated category of people classified as distant from the labour market, including those prone to the 'new risks'. In one of its reports Supreme Chamber of Control pointed out that the number of so called special programs (i.e. targeted at young adults, those with no

education and necessary job qualifications, single parents etc.) implemented on the local level has actually declined after introduction of the profiling procedure, and that activation programs offered to those labelled 'distant form the labour market' are in fact not targeted i.e. do not cover proper diagnosis of local labour market dynamics, and do not link knowledge on local labour market, demand and opportunities to individual needs recognition (NIK 2015). Eventually, the profiling procedure was withdrawn in 2019.

The profiling story illustrates - on the one hand – to what extent New Public Management ideas, with some delay though, together with bureaucratic approach to poverty and unemployment management instead of alleviation, invade the system of social support in Poland. It also shows what are the hazards of improperly executed targeting (discussion on pros and cons of targeting: Gilbert 2001). The mechanisms of adjustment and implementation, both on the systemic and local levels have failed in terms of the proper allocation of policy measures. In other words – the labour regulations and ALMP administration do recognize needs related to the 'new risks', though it does not seem able to target those needs properly. On the other hand, it concentrates on categories in 'particular labour market situation' showing the uniformization of activation measures directed to those prone to various labour market and life situation risks, and – at the same time – one of mechanisms pushing those in 'particular situation' to the precarious segment of the labour market, creating inequalities in access to activation measures among various categories of the unemployed.

4 Activation and new risks in social assistance

Another point of criticism against the profiling idea and procedures was, that it is based on unrealistic assumptions concerning collaboration of employment offices and social assistance centres. Sztandar-Sztanderska (2013: 32) had a point saying that the essence of the concept was to shift responsibility for the difficult-to-treat category from employment offices to other institutions – especially to social assistance centres, forcing them to assign resources for AIP (with the option of refunding 60% of spending from the state Employee Benefits Fund). Same negative remarks were confirmed by the Ministry of Labour report prepared three years after AIP initiation (MRPiPS 2016a). In other words, the profiling story shows also the strength of the bureaucratic base of institutional fragmentation on the local level - fragmentation that 'shuffling' hard-to-serve clients between institutions and the atrophy interinstitutional cooperation. The story can be also interpreted in relation to the social investment paradigm' implementation in Poland; 'shuffling' beneficiaries from labour offices to social assistance centres and denying them (as a result of the automated procedure) access to more efficient forms of activation meant that there was a category interpreted as 'unworthy to invest', or having to meet additional criteria to be worth investing. 'Unworthiness' can be treated as a reformulation of a deservig/undeserving poor distinction known from the English Poor Law history. As one of interviewed² social workers put it:

"...in the third profile are those already put at a loss, who are always drunk, long-term unemployed, people in their 60s... And that is logical [consequence of profiling] to me that they [labour office] do not offer them jobs any longer. Nevertheless, I do have a few persons classified to the third profile and I would like to offer these people a job anyway. But being classified in the third profile means that you are not allowed to look

² The text in this part refers to qualitative data gathered during the research project "Conditionality and contractualism in social assistance" conducted 2015-18. It covered 29 in-depth interviews with social workers in six locations (both rural and urban) in Poland. The main goal of the project was to analyse efficiency factors of individual welfare contracts as an activation tool.

for any job for them. And these people are already certain that they will be unemployed forever - but also insured and protected'.

In this case an incorrect qualification mismatch diagnosis and defining the clients as 'unworthy' has led to ceasing the activation process. However, our respondents have also clearly indicated welfare dependency as a long-term effect of the profiling - that is the welfare dependency as a result of a discrepancy between the well-informed diagnosis of the claimant' situation and abilities and a result of automated procedure. On the other hand, being classified as a person deserving to be activated does not mean that activation measures are adapted properly:

'And when he finally is in this profile, when they 'activate' him, then (...) he must just report with three stamps. Well, it's funny a bit.'

In other words, institutional fragmentation leads also to differentiated definitions of needs and labour market chances of the activated. The problem of 'shuffling' and social workers' critique of both procedures and effects of the activation measures offered by labour offices points at the more general issue of the typologies used within the social assistance, recognition of 'new' and 'old' risk categories and applying a social investment perspective.

The Act on Social Assistance passed in 1991 has established organizational system operating at local level, and institutional rules with a purpose to support families and individuals 'who cannot overcome their life problems, using own rights, resources, and capabilities'. Subsidiarity directed towards both individuals, families and communities is one of those rules, as well as some forms of targeting covering relatively wide spectrum of risks. From the beginning, social assistance benefits and services are means-tested, but apart from that at least one of the following must occur to qualify: poverty, unemployment, orphanage, homelessness, disability, chronic illness, domestic violence, human trafficking, need for the protection of maternity, helplessness in up-bringing or in running a household, maladjustment after leaving childcare facilities, inclusion of refugees, maladjustment of former prisoners, alcoholism and drug addiction, natural disaster situation. In the last decade the total number of families on social assistance decreased by 30% to 1,08 million due to the improving economic situation and lower unemployment. Consequently, the share of families receiving benefits due to poverty or unemployment in the total number of families is decreasing (see Figure 4), while increasing the share of families with disabilities and chronic illness. At the same time, the percentage of beneficiaries in non-mobility and post-working age is also increasing (GUS 2019b). Part of this change occurs due to population ageing, but social assistance visibly changes the profile and shifts the focus to age and illness problems.

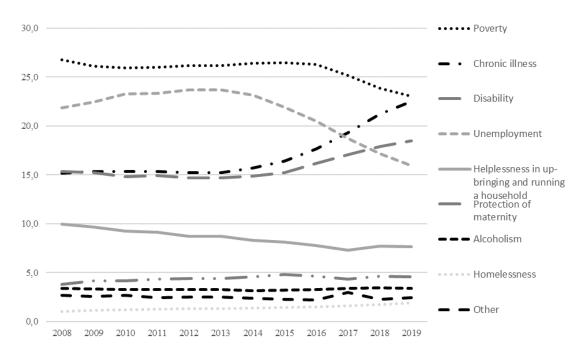


Figure 4: Structure of families receiving benefits by cause of difficult situation (%). Source: MRPiPS-03

However, statutory classification and criteria are loosely related to how social workers perceive and classify their clients. Research material suggests that the basic, to some extent commonsensual typology is based on distinction between those 'difficult' and those 'easy to handle'. The former category consists mainly of the addicts, passive and withdrawn, those with serious family disfunctions, but also school dropouts, underqualified young adults lacking social bonds, and those over 60 years of age. At the same time, being 'hard-to-serve' is often related to the long-term welfare dependency, and clients from this category are often treated as 'not promising' regarding anticipated effects of activation measures - irrespective of the type of risk they are facing. Regarding the 'new risks' - interviewed social workers point also at the family structure (e.g. lone mothers or large families) as a factor hindering social and labour market reintegration. On the one hand, there is a category of 'collective recipient' families where welfare dependency is transmitted intergenerationally (Balcerzak-Paradowska 2018: 160), and where passive attitudes are strengthened among household members. On the other – lone parents with younger children are often not activated as well – mainly because of unavailability of public childcare institutions for children in pre-kindergarden age and lack of family support. In addition, available employment opportunities are limited to the secondary segment of the labour market, what relates to anticipated precarious salaries and working conditions. As one of social workers put it:

'Single mothers and single fathers - they are a problem (...) we are not activating them at all if a single parent lives alone and has his or her parents somewhere else, or when they are no longer able to take care of their grandchildren on a daily basis (...) They won't be looking for employment, because they are not able to pay for a babysitter or a private kindergarten at the moment.'

Obviously, familialization of the childcare has its consequences in actual dropouts from the activation programs offered by welfare services and increases the importance of financial provision for families with younger children. The effect is even more visible in case of large families what suggests that the occurrence of some of the 'new risks' is moderated by the

relatively generous provision of the "Family 500+" program. In this case an economic calculation leads – as interviewed social workers indicated – to decisions to withdraw from the labour market and refusal to being activated:

'Because of the 500+ (...) it will be more and more difficult to motivate them to any active job search, because now it certainly will not be profitable to work (...) For a family of five it has been difficult anyway to motivate and enforce anything, because the support from the assistance centre was relatively high anyway. And the 500+ will give them more money (...) so you cannot do anything anymore and you will not be able to do anything, because these people have money.'

Considering also, that the program is semi-universal (i.e. targeted solely at families with children) and unconditional, it obviously affects implementation of those activation measures that are conditional or have at least some elements of conditionality. This is the case of the socalled social contract – the flagship social work instrument, introduced in the unified form in 2010 and strongly promoted in the following years as a modern, welfare-to-work solution. The contract – a written agreement between social worker and a person applying for assistance, is meant to specify rights and obligations of the parties, and to define the activities undertaken to overcome the difficult situation the person or family are in. Refusing to sign a contract or not complying to its obligations may be the grounds for refusing allowance, revoking the granting decision, or suspending benefits. The scope of contracting in the last decade has been relatively low - the percentage of social assistance beneficiaries on contracts oscillated around 5% mainly due to the scarcity of local institutional resources necessary for effective reintegration, limited employment opportunities in local labour markets, underfunding of social assistance and work overload, but also the attitudes of social workers preferring passive measures and poverty management rather than activation (Poławski 2018). We The interviewed social workers were practically unanimous that generous redistribution programs such as 500+ make it practically impossible to apply any conditional measures – including a social contract - towards certain categories of clients and a significant reduction in the chances of activation of adults in families with children. Paradoxically, redistributive investing in the well-being and protection of children means – in case of 500+ - a departure from the social investment paradigm and a step back when it comes to building links with the labour market.

5 Conclusion

Ferrera (1996) pointed at 'excesses in income maintenance' and 'hiper-protection' of some categories as specific to the Southern model of the welfare state. Bearing in mind that 500+ is aimed exclusively at families with children and means investing unprecedented budgetary resources in a policy based solely on financial transfers, it shall be treated as an element of 'southernization' of the Polish welfare regime. The analysis also suggests familialization, institutional segmentation of activation, class-oriented dualism in the access to social services (to childcare in particular) and emerging pressures on the residual nature of the support system, which is also consistent with the thesis about the Southern model of the welfare state. This article suggests also that the convergence within European welfare systems announced at the beginning of the previous decade (Amitsis et. al 2003) does not really occur, and that concentrating on the new risks would add to our knowledge on welfare regimes dynamics, on differential implementation of European social model and on presumably common elements of social policy within the European Union. It also points to the direction CEE countries are heading. Clustering of CEE and Southern states in selected areas of 'new' social risks (e.g. reconciling work and family life solutions and underfunding of the locally operated family

services) justifies a further research on elements of the Southern model shared by CEE countries, and – if such southernization occurs – about mechanisms and factors behind. Some of those factors, namely low level of expenditures on centrally regulated and funded services, high level of income inequality and segmentation of the labour market were mentioned in the text. Another one is – recognised in literature – a consequence of a marginal role of the social assistance. In Poland social assistance is 'by default', and in accordance with the law passed in the beginning of the transformation, treated as a 'last resort' institution offering support to those only, who cannot overcome their life difficulties using own rights, resources and possibilities. The problem is that "Family solidarity or protection by close relatives (...) is thus a result of this absence of support in the long run. Without these supports, families are forced and required to assume many caring responsibilities towards children, youth and elderly, but also towards many other vulnerable groups like handicapped or chronically ill people. They have to do so as there isn't any real alternative" (Martin 2015: 9). The weakness of social assistance creates or strengthens 'familialism by default' both in Poland and the South. The impact of conservative tendencies and right-wing populism of the last decade on the welfare regime development (in Poland – after 2015 elections) is still waiting for evaluation.

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