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Social Objectives and Functions of the “Family 500 (800)+” Programme as a Financial Policy and Financial Law Instrument in Poland⁴

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Abstract

The research area of the paper is the “Family 500(800)+” programme, which is the most expensive family policy instrument in the history of the Third Republic of Poland. Initially, that is, from 1 April 2016, the program consisted of the payment of a child-rearing benefit of PLN 500 for the second and each subsequent child. Over time, the benefit was extended to cover all children, and its amount was increased to PLN 800.

The aim of the article is to analyse the “Family 500(800)+” programme as an instrument of financial policy. The paper is constructed around two research questions, i.e. “*What were and are the social objectives of the “Family 500 (800+)” programme?*” and “*Does the programme actually achieve these objectives?*” The paper concludes that while the “Family 500(800)+” programme has an impact on reducing poverty among Polish families, its effectiveness in improving the country’s demographic situation is limited.

Keywords: financial law, “500(800)+ Family” programme, poverty rate, demographic situation.

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Spółeczne cele i funkcje programu „Rodzina 500 (800)+” jako instrumentu polityki finansowej i prawa finansowego w Polsce⁵

Streszczenie

Obszarem badawczym artykułu jest program „Rodzina 500(800)+”, który jest najdroższym instrumentem polityki rodzinnej w historii III RP. Początkowo, tj. od 1 kwietnia 2016 r., program polegał na wypłacie świadczenia wychowawczego w wysokości 500 zł na drugie i każde kolejne dziecko. Z czasem świadczenie zostało rozszerzone na każde dziecko, a jego wysokość zwiększono do 800 zł.

Celem artykułu jest analiza programu „Rodzina 500(800)+” jako instrumentu polityki finansowej. Artykuł skonstruowany jest wokół dwóch pytań badawczych: jakie były i są cele społeczne programu „Rodzina 500(800)+” oraz czy program faktycznie realizuje te cele? W artykule stwierdzono, że choć program „Rodzina 500(800)+” ma wpływ na zmniejszenie ubóstwa wśród polskich rodzin, to jednak jego skuteczność w poprawie sytuacji demograficznej kraju jest ograniczona.

Słowa kluczowe: prawo finansowe, program Rodzina “500(800)+”, wskaźnik ubóstwa, sytuacja demograficzna.

⁵ Badania wykorzystane w artykule nie zostały sfinansowane przez żadną instytucję.

Introduction

Accused of contributing to the decline in women's professional activity,⁶ as confirmed by scientific studies,⁷ the programme is also blamed for promoting alcohol consumption in society,⁸ for being an election gimmick⁹ and a form of unreasonable social handout (in other words, a transfer of income from the general pool of taxpayers to selected groups of voters),¹⁰ for "giving fish instead of teaching fishing",¹¹ or even for pushing the state towards bankruptcy.¹² On the other hand, it is presented as one of the most important programmes of Polish social policy – a financial foundation for family support, an instrument that removes barriers discouraging citizens from having children, based on solid axiological foundations that treat family as a subject – not an object – of state policy.¹³ This is a programme that does not remain indifferent to the economy – that is, the labour market, consumption, the level of poverty, public debt, the public finance sector, and GDP¹⁴. However, the programme is also said to "defend conservative family values against the influence of Western liberalism."¹⁵

The above refers to the "Family 500(800)+” programme, the most expensive family policy instrument in the history of the Third Republic of Poland, which differs from many other public programmes in that it has deeply penetrated the

⁶ *Nie pracują, bo dostają 500 plus. Polki rezygnują z pracy z powodu otrzymywanych świadczeń.* Available from: www.forbes.pl (accessed: 20.03.2018).

⁷ I. Magda, N. Brandt, A. Kielczewska, *The "Family 500+" child allowance and female labour supply in Poland*, "OECD Economics Department Working Papers" 1481, OECD Publishing 2018.

⁸ M. Chądzyński, J. Kapiszewski, *Polacy mieli przepić 500 plus. Nie sprawdziło się.* Available from: www.forsal.pl (accessed: 10.03.2017).

⁹ *Petru: Program 500+ to kielbasa wyborcza. Pomoc socjalna, która nikogo nie zachęci do rodzenia dzieci.* Available from: www.wyborcza.pl (accessed: 4.02.2016).

¹⁰ K. Kolany, *Kielbasa wyborcza nie tak kosztowna, jak się tego obawiano. Jest też zła wiadomość.* Available from: www.bankier.pl (accessed: 17.05.2023).

¹¹ *Wędka czy ryba czyli gwóźdź do trumny liberalizmu.* Available from: www.salon24.pl (accessed: 8.07.2018).

¹² *Bugaj: „Rodzina 500 plus” nie zrujnuje budżetu państwa.* Available from: www.bankier.pl (accessed: 16.08.2016).

¹³ Ministry of Family, Labour and Social Policy. Report of the Council of Ministers on the implementation of the Act on State Assistance in Raising Children in 2016–2017, Warszawa 2018, p. 2.

¹⁴ A. Kułakowska, *Program „Rodzina 500+” a gospodarka Polski*, "Postępy Techniki Przetwórstwa Spożywczego" 2018, 2, p. 138.

¹⁵ J. Gromadzki, K. Sałach, M. Brzeziński, *When populists deliver on their promises: the electoral effects of a large cash transfer program in Poland*, "Economica" 2022, p. 323.

popular consciousness, possibly due to the amount of the benefit, its simple mechanism, widespread media coverage, and the sentiment that the policy directly affects the fate of people.¹⁶

The “Family 500(800)+” programme, implemented in Poland since 1 April 2016, has consisted of the payment of a child-rearing benefit of PLN 500 (about €115) for the second and each subsequent child. The programme was introduced during the first 100 days of Prime Minister Beata Szydło’s right-wing government. Initially, that is, from 1 April 2016, the child-rearing benefit for the first child was available where the family income did not exceed PLN 800 per household member, and where the family had a disabled child, the amount was set to PLN 1,200. The “Family 500(800)+” programme was the fulfilment of one of the main promises made by the right-wing party “Law and Justice” in the 2015 parliamentary elections. After the subsequent parliamentary elections, from 1 July 2019, the programme was extended to include every first child, thus abolishing the income threshold.¹⁷ After the following parliamentary elections – won by the opposition coalition (Civic Coalition), from 1 January 2024, the benefit was raised to PLN 800 (about €185) as part of valorisation.¹⁸

Initially, that is, during the campaign period preceding the 2016 elections, the opposition coalition opposed the “Family 500(800)+” programme, claiming that the state could not afford such a programme. However, when “Law and Justice” introduced it, the “Civic Coalition” not only announced before the 2023 election that it would not abandon the programme but also declared that it would raise the amount of the benefit after winning the elections. At the same time, the “Civic Coalition” encouraged the “Law and Justice” government to raise the amount of the benefit earlier (even before the elections), thereby seeking to take a serious electoral argument out of the hands of the “Law and Justice” party. As a result, both political rivals declared that they would raise the family allowance if they won the upcoming elections.

With the above in mind, in analysing the economic and social impact of the programme, this article does not intend to consider in any depth the emerging positions calling for its suppression. Despite the possibility of admitting the validity of the arguments advanced in favour of such standpoints, from the political point of view and in the current situation of public finances, they are unrealistic – although not improbable. Indeed, at present, the “Family 500(800)+” programme enjoys

¹⁶ A. Gromada, *Czemu służy program Rodzina 500 plus? Analiza celów polityki publicznej i polityki partyjnej*, “Ruch Prawniczy, Ekonomiczny i Socjologiczny” 2018, 3, p. 231.

¹⁷ Act of 26 April 2019 on amending the Act on State Aid in Upbringing of Children and Certain Other Acts (Journal of Laws, item 924).

¹⁸ Act of 7 July 2023 on Amending the Act on State Aid in Upbringing of Children (Journal of Laws, item 1565).

social acceptance (albeit not entirely unequivocal), and, as a result, most political groupings in the Polish Parliament, – apart from the “Freedom and Independence Confederation” (PL: *Konfederacja Wolność i Niepodległość*) – are in favour of its preservation, at most proposing modifications of its individual principles. One could even venture a statement that the programme has become a mainstay element of the state’s family policy system in Poland, while a significant reduction of funds allocated for its implementation through legislative changes, or even its suppression, could only take place, in the broadest sense, in a situation of a deep crisis of public finances.

Research Design

The aim of the article is to analyse the “Family 500(800)+” programme as an instrument of financial policy, understood as the deliberate and purposeful activity of individuals and institutions focused on setting and achieving specific social and economic goals through financial measures (actions, initiatives).¹⁹ Particular emphasis is placed on the social effects of the programme.

The paper is constructed around two research questions: “*What were and are the social objectives of the “Family 500 (800+)” programme?*” and “*Does the programme actually achieve these objectives?*”

The research method applied involves qualitative analysis (unobtrusive research²⁰) of:

1. Government documents (explanatory memoranda to legal acts and annual reports),
2. Scientific articles in Polish and English,
3. Content published in the media, in written and oral form, including interviews, expert presentations, and politicians’ speeches.

In legal science, there is a distinction between the objectives and functions of law. The objective of law “refers to what is aimed to achieve, while the functions

¹⁹ E. Ruśkowski, *Istota i pojęcie polityki finansowej*, [in:] *Finanse publiczne i prawo finansowe*, ed. C. Kosikowski and E. Ruśkowski, Warszawa 2006, p. 32; B. Gulbicka, *Metodologiczne podstawy i praktyka prowadzenia polityki finansowej*, [in:] *Polityka finansowa Polski wobec aktualnych i przyszłych wyzwań*, vol. 1, eds. J. Kulawik and E. Mazurkiewicz, Warszawa 2005, pp. 37–38.

²⁰ E. Babbie, *The practice of social research*, Australia–Brazil–Japan–Korea–Mexico–Singapore–Spain–United Kingdom–United States 2013, p. 295.

of law refers to the actual state”.²¹ The term “function of the law” itself is ambiguous, and according to one of the meanings, a function may denote both the effect intended and unintended by the legislator.²² With these considerations in mind, Section 3 present the legal basis of the programme, Section discuss its objectives, while Section 5 covers its fulfilled functions (effects). In the conclusions, reference is made to the research questions posed.

Legal Basis of the “Family 500(800)+” Programme

Pursuant to Article 1(2) of the Act of 11 February 2016 on state assistance in raising children (Journal of Laws of 2024, item 1576, as amended), Polish citizens and, under certain conditions, foreigners are currently entitled to a child benefit. The purpose of this benefit is to partially cover the expenses related to raising a child, including their care and satisfying the child’s basic needs (Article 4(1)). The child benefit is payable to: (1) the mother or father if the child lives with and is dependent on either parent; (2) the actual guardian of the child if the child lives with and is dependent on the actual guardian; (3) the legal guardian of the child; or (4) the director of a social welfare home; or (5) a foster family, a person running a family-type children’s home, the director of a care and education facility, or the director of a regional care and therapy facility or the director of an intervention and pre-adoption facility. In addition, the aforementioned Act stipulates that the child benefit is payable until the child reaches the age of 18 (Article 4(3)). In turn, pursuant to Article 5 of the Act, the child benefit is payable in the amount of PLN 800.00 per month per child.

Pursuant to Article 8(1), in turn, the child benefit is not payable if: (1) the child is married; (2) the child has been placed in an institution providing 24-hour care; (3) an adult child has an established right to a child benefit for their own child; or (4) a family member is entitled to a benefit abroad for a child that is similar in nature to the child benefit, unless the provisions on the coordination of social security systems or bilateral international agreements on social security provide otherwise.

Although the benefit is monetary in nature, the beneficiaries themselves decide how to use it. However, where it is found that the child benefit is being wasted or

²¹ U.K. Zawadzka-Pąk, *Objectives of Public Finance law and axiological analysis of law – assumptions and a Proposal for a research approach*, “Krytyka Prawa. Niezależne Studia nad Prawem” 2024, 1, pp. 252–266.

²² I. Bogucka, *Funkcje prawa. Analiza pojęcia*, Kraków 2000, pp. 51–71; M. Rączkowski, W. Ostaszewski, *Funkcje odpowiedzialności materialnej*, [in:] System Prawa Pracy, vol. III, *Indywidualne prawo pracy. Część szczegółowa*, eds. K.W. Baran, M. Gersdorf, K. Rączka, Warszawa 2021, p. 1273.

spent contrary to its purpose, the child benefit due, in whole or in part, may be transferred to the beneficiary by the head of the social welfare centre or the director of the social services centre in kind or in the form of payment for services. Currently, proceedings concerning the child benefit are conducted by, and the benefit is paid by the Social Insurance Institution (Article 10).

Stated Objectives of the “Family 500(800)+” Programme

On 25 October 2015, Poland held parliamentary elections, which were won by the right-wing “Law and Justice” party. This party became the first political grouping in post-communist Poland to form a single-party government without coalition partners. On 16 November 2015, the government was sworn in and submitted a draft law on state aid for raising children. On 11 February 2016, the text of the law was passed, under which the “Family 500+” programme began to be implemented in Poland on 1 April 2016. The law in question thus came into force within the first 100 days of a government whose constituent party had been in parliamentary opposition for eight years. This child benefit programme was the largest social transfer scheme since Poland’s transition to a market economy, and it significantly improved the financial situation of families with children (...). The amount of the transfer per child was relatively large, as it was equal to 34% of the per capita disposable income in Poland.²³

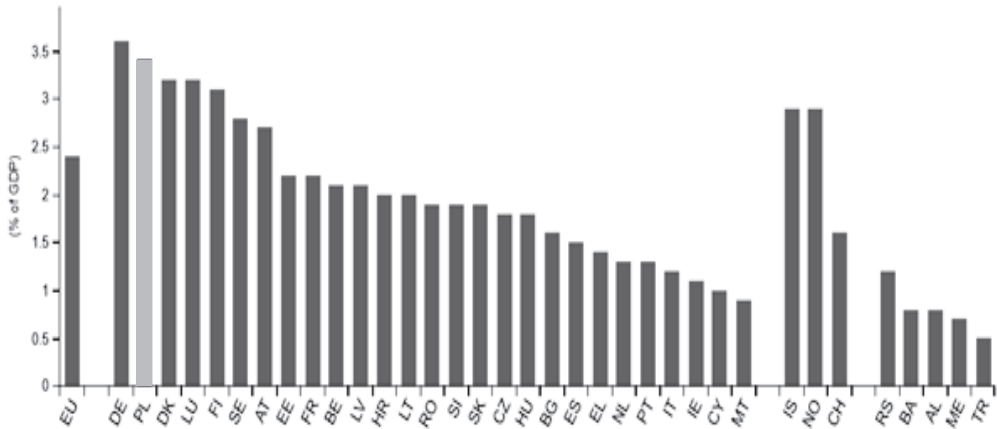
Poland has thus joined the 21 countries in the European Union and the European Economic Area (EEA) that provide child-rearing aid in the form of a universal benefit, paid without an income criterion. In terms of its amount at the time of its introduction, the Polish benefit was one of the highest in the Central and Eastern European region, and, in some cases, also higher than the benefits available in wealthier EU countries. For example, in Austria the benefit ranged from about €114 to €165, while in Finland it ranged from about €95 to €173. At the same time, among the new EU Member States, similar benefits are offered by the Czech Republic (€19–27), Estonia (€55–100), and Hungary (€38–82). Taking into account the size of Poland’s GDP compared to that of the older EU Member States, the share of the child-rearing benefit offered to families with children was considerably higher in Poland.²⁴

²³ J. Gromadzki *et al.*, *op. cit.*, pp. 321–323.

²⁴ Ministry of Labour, Family and Social Policy, *Report of the Council of Ministers on the implementation of the Act on State Assistance in Raising Children in 2016–2017*, Warszawa 2018, pp. 20–21.

The existence of the “Family 500(800)+” programme significantly affects the level of total spending on family benefits. This is evidenced by the data presented in the Figure 1.

Figure 1. Expenditure on child-rearing benefit, 2021



Source: Eurostat.

The above table shows that among EU countries, only Germany allocates a higher percentage of GDP than Poland to family–child benefits. Poland allocated 3.4% of its GDP for this purpose in 2021.

The purposes of the benefit have been articulated in the law introducing it, in its regulatory impact assessment and justification, as well as in reports on its implementation.

First, according to the law introducing the 500+ benefit, the purpose of the benefit is to partially cover expenses related to raising a child, including childcare and satisfying the child’s basic living needs.²⁵ This is the only purpose of the programme articulated explicitly in the text of the law itself.

Second, a further elaboration of this objective was included in the governmental justification of the bill introducing the “Family 500+” benefit, which indicated that “the proposed solution is intended to reduce the financial burden of raising children incurred by families, and thus encourage the decision to have more children. In addition, as noted in the justification, the introduced child-rearing benefit is directed to families with dependent children, and its purpose is primarily to partially cover expenses related to meeting the needs of life and raising children.

²⁵ Article 4(1) of the Act on State Aid for Upbringing of Children (Official Journal of 2024 no. 1576, as amended).

Educating and preparing children for life entails a heavy financial burden for dependents, especially in families with multiple dependents. As a result, families often face economic barriers related to the size of their income. It is therefore necessary to introduce such solutions to eliminate or significantly reduce them. The proposed law will make it possible to reduce the economic constraints that currently exist, particularly among young people who decide to have offspring, especially second and subsequent children.”²⁶ The justification further indicates that “the essence of the regulations introduced by the proposed law is to extend the child-rearing benefit to the widest possible range of persons with dependent children, thus realizing the basic objective, i.e. economic support of families – especially those at risk of poverty – and partial coverage of expenses of parents or guardians of children for the high cost of raising and educating them.”²⁷

Third, the objectives of the “Family 500+” programme were outlined in the Regulatory Impact Assessment²⁸ dated 2 December 2015. According to this document, the bill primarily aimed to support families raising children and to counteract demographic decline in Poland. Indirectly, the objective of poverty reduction was also identified.

Fourth, the first report on the implementation of the law introducing the 500+ benefit identified three main goals pursued by the programme. The first was a pronatalist goal related to increasing the birth rate and raising the fertility rate. The second goal was investment in human capital, linked to the idea of building a competitive society equipped with knowledge and skills, on the assumption that financial support offered to families through cash transfers would contribute to providing children with a solid education, adequate nutrition, and access to medical care. The third goal was to reduce poverty among the youngest.²⁹

The officially announced goals of “Family 500(800)+” do not hint at the political objective of seizing or maintaining power. Nevertheless, it is a programme that contributed to the electoral success of the “Law and Justice” party. Moreover, according to Elżbieta Rafalska, Minister of Labour, Family and Social Policy, whose ministry implemented the “Family 500+” programme, “this program illustrates the entire gap between the social policy proposed by “Law and Justice” and all

²⁶ *Government bill on state aid for upbringing of children*, “Parliamentary paper” no. 216 of 1 February 2016, p. 7.

²⁷ *Ibidem*, pp. 7–8.

²⁸ Pursuant to Article 50 of the Act of 27 August 2009 on Public Finance (consolidated text, Journal of Laws of 2024, item 1530, as amended), regulatory impact assessment (in short RIA) constitutes an appendix to bills and drafts of other legal acts adopted by the Council of Ministers, the financial effect of which may be an increase in expenditures or decrease in revenues of public finance sector entities in relation to the amounts resulting from the binding provisions. The RIA should contain: specification of the amount of these effects and indication of the sources of their financing;

²⁹ Ministry of Labour, Family and Social Policy, *op. cit.*, p. 5.

the other opposition parties, which use social instruments, only during the campaign period, while they never really focused on this social policy. [The situation] shows this gap between the social policies of the various political groups. (...) They really want to jump on this 800-plus train all the time today and show their participation, and they really have no complete involvement in it.”³⁰

Social Functions of “Family 500(800)+” Programme in the Context of its Stated Objectives

Not all of the above objectives lend themselves to direct measurement, such as the general aim of supporting families raising children. However, some objectives are measurable. Consequently, this section analyses the implementation of two objectives of the programme: reversing the negative demographic trend and combating poverty.

Impact of the “Family 500(800)+” Programme on Demography

Poland has been experiencing a negative demographic trend for almost three decades; accordingly, one of the main objectives of the programme is to increase the number of births and improve the fertility rate. According to data from the Polish Central Statistical Office (PL: *Główny Urząd Statystyczny*, hereinafter GUS), since 1990 the fertility rate has remained below 2, which means that it does not guarantee simple generational replacement. In order to ensure stable demographic development, at least 210–215 children should be born annually per 100 women aged 15–49, whereas the current figure is approximately 116.³¹ The optimal fertility rate, considered favourable for stable demographic development, is therefore 2.1–2.15.³²

Data published by GUS also show that the number of births has been declining almost continuously, having failed to reach 400,000 since 1998, with the exception of 2008–2010 and 2017. In 2016, that is, the year in which the “Family 500(800)+” programme was introduced, 382,300 births were registered, 13,000 more than in 2015; in 2017, 402,000 children were born, 20,000 more than in the previous year. The increase in the number of births during this period mainly concerned second,

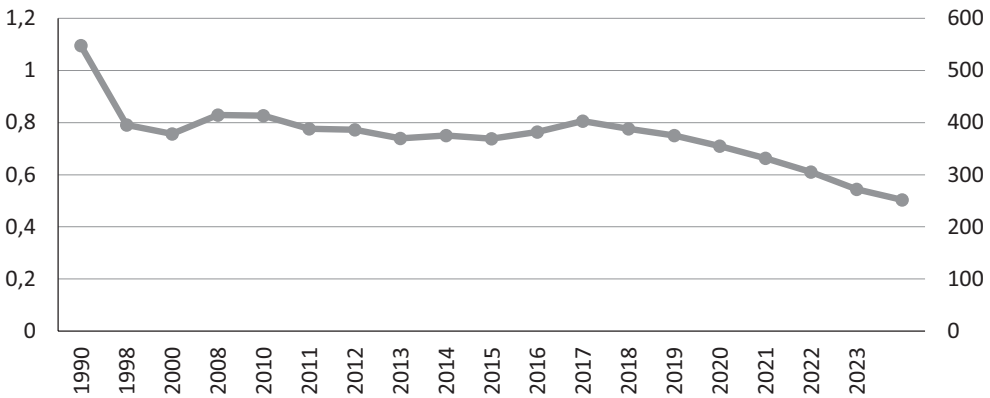
³⁰ Rafalska: *Tusk parę lat temu wyśmiał 500 plus, a później chciał wypłacać od 1 czerwca*, TV Republika. Available from: <https://www.youtube.com/watch?v=EOuc5x8wJ2c>.

³¹ Central Statistical Office, *Demographic situation of Poland until 2023*, Warszawa 2024, p. 10. Available from: <https://stat.gov.pl/obszary-tematyczne/ludnosc/ludnosc/sytuacja-demograficzna-polski-do-2023-roku,40,4.html>.

³² Ministry of Labour, Family and Social Policy, *op. cit.*, p. 3.

third, and subsequent children, whose share increased at the expense of first births.³³ In 2018, 388,200 births were registered, 13,800 fewer than in the previous year, marking the first decline in the number of births since 2015. From 2020 onwards, further decreases were recorded: in 2020, 355,300 children were born (19,700 fewer than in the previous year); in 2021, 331,500 (23,800 fewer); in 2022, 305,100 (26,400 fewer); and in 2023, 272,500 (32,600 fewer).³⁴ In 2024, the number of births is projected to reach 252,000, 20,500 fewer than in the previous year.³⁵ Detailed data are presented in the Figure 2.

Figure 2. Number of Children Born in Poland in Selected Years (in thousands)



Source: own elaboration based on data from the Central Statistical Office, *Demographic Yearbook*, Warszawa 2024, pp. 26–27. Available from: <https://stat.gov.pl/obszary-tematyczne/roczniki-statystyczne/roczniki-statystyczne/rocznik-demograficzny-2024,3,18.html>.

Members of political parties opposed to “Law and Justice” at the time the 500(800)+ programme was introduced have tended to equate the negative demographic trend outlined above with the failure of the programme as a whole. For example, one of Radio Wnet’s guests, Dr Jarosław Sachajko, a deputy of the Kukiz’15 party, stated: “Let us remind ourselves what the 500-plus programme was for. It

³³ Central Statistical Office, *Demographic situation of Poland until 2017. Births and fertility*, Warszawa 2018, p. 13. Available from: <https://stat.gov.pl/obszary-tematyczne/ludnosc/ludnosc/sytuacja-demograficzna-polski-do-2017-roku-urodzenia-i-dzietnosc,33,1.html>.

³⁴ Central Statistical Office, *Demographic Situation of Poland until 2023*, Warszawa 2024, p. 11. Available from: <https://stat.gov.pl/obszary-tematyczne/ludnosc/ludnosc/sytuacja-demograficzna-polski-do-2023-roku,40,4.html>.

³⁵ Central Statistical Office, *Population. Status, structure and natural movement in territorial cross-section in 2024. Status on 31 December*, Warszawa 2025, p. 12. Available from: <https://stat.gov.pl/obszary-tematyczne/ludnosc/ludnosc/ludnosc-stan-i-struktura-ludnosci-oraz-ruch-naturalny-w-przekroju-terytorialnym-w-2024-r-stan-w-dniu-31-12,6,38.html>.

was supposed to be a pro-demographic programme, and it has failed completely. The 1-to-44 ratio is a replacement ratio that will soon lead Poles to extinction. We are a rapidly ageing society, because for there to be replacement – not population growth, but replacement alone – the ratio should be 2 to 1, but it is 1 to 44. This is therefore a total failure. The President and politicians of the Law and Justice Party, seeing this, are now giving PLN 500 for the first child. The intended effect could be far better achieved through a tax-free allowance, which would primarily benefit low-income earners.”³⁶

Meanwhile, demographic data indicate that the decline in the number of births is largely attributable to the decreasing number of women of childbearing age (15–49 years), with most births occurring among women aged 20–39. This is because women born in the early 1980s – particularly during Poland’s so-called baby boom – are now exiting their reproductive years. Since 2012, the number of women aged 20–39 has been steadily declining, with the pace of decline accelerating markedly in recent years: the number of women in this age group fell by 44,000 in 2013 compared to the previous year, by 61,000 in 2014, by 105,000 in 2017, by 133,000 in 2020, and by 164,000 in 2023.³⁷

In addition to the number of births, an important indicator of demographic change is the fertility rate – the average number of children a woman gives birth to during her reproductive years. In Poland, this rate has been consistently declining since 1989, and since 1997 it has remained below 1.5. Between 1997 and 2022, this rate ranged between 1.2 and 1.3, exceeding 1.4 only in the years 2017–2019). In 2023, it reached a record low level of 1.17. Among the factors contributing to the declining number of births are the long-observed decline in fertility, linked to social and cultural changes – such as later age at marriage, postponement of parenthood, and career development – as well as economic barriers and difficulties in balancing child-rearing with professional activity.³⁸

Impact of the “Family 500(800)+” Programme on Combating Poverty

Fighting poverty and improving the living conditions of children constitute another objective of the “Family 500(800+)” programme. Poverty in its social dimension consists in the lack of material resources sufficient to meet basic needs with regard

³⁶ Interview on March 17, 2019 on Radio Wnet with Dr. J. Sachajko, “Program 500+ poniósł totalne fiasko. Wskaźnik zastępowalności jest cały czas niski. Available from: <https://www.youtube.com/watch?v=rpQzfdAIY0>.

³⁷ Ministry of Family, Labour and Social Policy, *Family 500+. Report of the Council of Ministers on the implementation of the Act on state aid in unbringing children in 2023*, Warszawa 2024, p. 11.

³⁸ *Ibidem*, s. 12.

to access to goods and services.³⁹ Poverty also occurs at the economic level, reflecting the unequal distribution of monetary and material resources.⁴⁰ In Poland, three basic indicators are used to describe the scale of poverty: the extreme poverty rate, the relative poverty rate, and the statutory poverty rate. First, the extreme poverty indicator (subsistence minimum) is established on the basis of the subsistence minimum estimated by the Institute of Labour and Social Affairs (IPiSS) for a one-person household. The subsistence minimum takes into account only those needs whose satisfaction cannot be postponed, and consumption below this level hinders survival and poses a biological threat to life and to the psycho-physical development of the individual.⁴¹ Second, the relative poverty indicator represents the percentage of people living in households whose expenditure levels fall below the relative poverty line, defined as 50% of the average monthly expenditure calculated across all households.⁴² Third, the statutory poverty rate is defined by reference to income thresholds which, according to the Social Assistance Act in force, entitle individuals to apply for a cash benefit from the social assistance system.⁴³ Figure 3 illustrates the extent of poverty in Poland measured with these three indicators.

The graph above shows that in the first two years the “Family 500(800)+” programme (that is, 2016 and 2017), all poverty indicators declined. The relative poverty rate between 2010 and 2015 ranged between 16 and 17%. Between 2016 and 2019, the value of this indicator fell to 13–14%. From 2020 to 2023, approximately 12% of people living in households experienced relative poverty (12.2% in 2023). In contrast, the statutory poverty rate between 2010 and 2012 stood at around 7%. In 2013, the extent of statutory poverty rose sharply to approximately 13% and remained at 12–13% between 2013 and 2016. Since the introduction of the “Family 500(800+)” programme, there has been a clear downward trend. The extreme poverty rate, between 2010 and 2015 – that is, prior to the introduction of the benefit – remained within the range of 6–7% of persons living in households, whereas from 2016 onwards it declined to approximately 4–5%. In 2023, however, the extent of extreme poverty increased by 2 percentage points compared to the previous year, reaching 6.6%, a level close to that observed before 2015 (6.5%).

³⁹ S. Kalinowski, *Poverty in Rural Areas: An Outline of the Problem*, “Acta Scientiarum Polonorum. Oeconomia” 2020, 19(4), p. 70.

⁴⁰ P. Kucharska, *Ocena skuteczności programu „Rodzina 500+” w zakresie ograniczenia ubóstwa i zwiększenia dzietności w Polsce*, “Zeszyty Naukowe Uniwersytet Ekonomiczny w Krakowie” 2020, 989(5), p. 88.

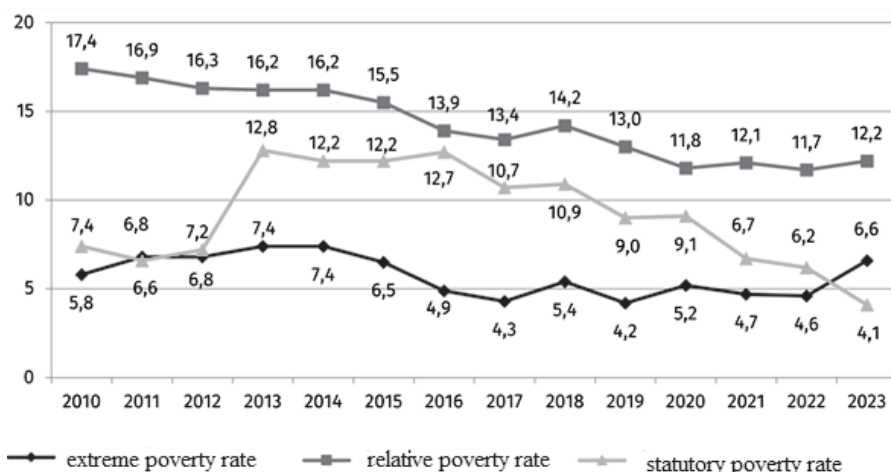
⁴¹ Central Statistical Office, *Concepts used in public statistics. Extreme poverty rate indicator (extreme poverty rate)*. Available from: <https://stat.gov.pl>.

⁴² Central Statistical Office, *Concepts used in public statistics. Relative poverty range indicator (relative poverty rate)*. Available from: <https://stat.gov.pl>.

⁴³ Central Statistical Office, *Concepts used in public statistics. Statutory poverty rate (statutory poverty rate)*, <https://stat.gov.pl>.

Importantly, this increase in extreme poverty occurred during a period of geopolitical instability caused by the war in Ukraine and the energy crisis, as well as persistently high inflation. Data from the Central Statistical Office show that the material and living conditions of children aged 0–17 (i.e. the beneficiaries of the programme) improved steadily after 2016. Extreme poverty among children declined from 9% in 2015 to 4.5% in 2019, which constitutes a significant improvement. However, it is important to note that although the “Family 500(800)+” programme aimed to reduce child poverty, this effect has not been sustained. From 2021 onwards, extreme poverty among the youngest began to rise again, reaching 7.6% in 2023, representing an increase of 32% compared to 2022. Relative poverty among children also increased, reaching 14.3% in 2023. Detailed data are presented in Figure 4.

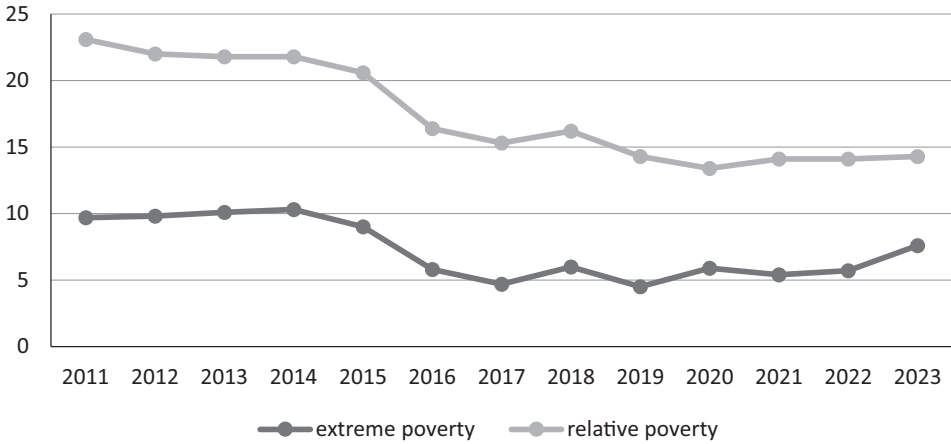
Figure 3. The Extent of Poverty in Poland Between 2010 and 2023 According to the Poverty Lines Adopted in a Given Year (% of persons in households)



Source: Central Statistical Office, *The extent of economic poverty in Poland in 2023* (based on the results of the Household Budget Survey), Warszawa 2024.

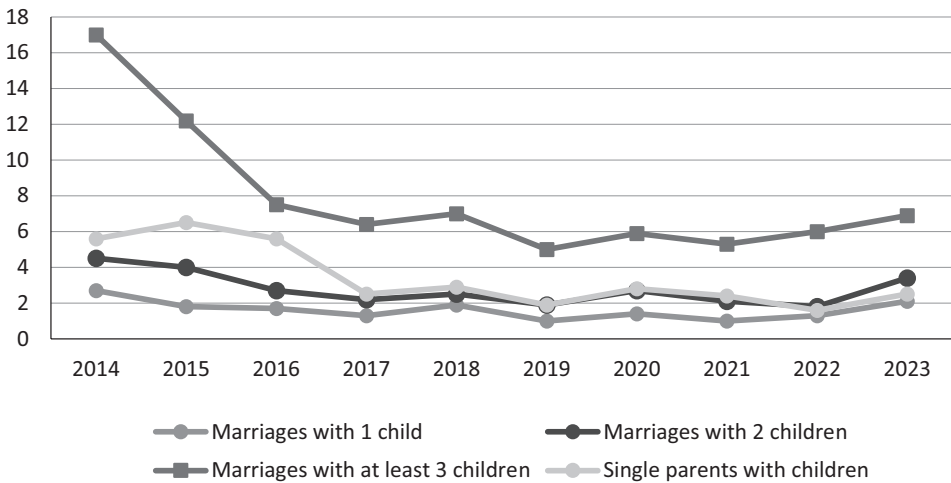
Since 2016, the largest reductions in extreme poverty have been observed among families with at least three children and single-parent households. The extreme poverty rate among families with at least three children decreased from 7.5% in 2016 to 6.4% in 2017, while in the case of single parents it fell by 3.1 percentage points, from 5.6% in 2016 to 2.5% in 2017. A comparison of data for 2023 to 2016 indicates a sustained decrease in extreme poverty among married couples with at least three children and single parents. By contrast, living conditions deteriorated among families raising one child or two children. Detailed data in this regard are presented in Figure 5.

Figure 4. Child Poverty (0–17 years) in 2011–2023 (in %)



Source: based on the Ministry of Family, Labour and Social Policy, *Family 500+*. Report of the Council of Ministers on the Implementation of the Act on State Aid in Upbringing of Children in 2023, Warszawa 2024, pp. 8–10.

Figure 5. The Extent of Extreme Poverty by Type of Household with Children in 2014–2023 (in %)



Source: Ministry of Family, Labour and Social Policy, *Family 500+*. Report of the Council of Ministers on the implementation of the Act on State Aid in Upbringing of Children in 2023, Warszawa 2024, p. 8.

An analysis of the above data indicates that the extent of extreme poverty has increased across all types of households with children. The primary contributing factors include inflation and the resulting decline in the real value of the child-rearing benefit.

Conclusions

The “Family 500(800)+” programme is a pro-family policy instrument of the state, whose main statutory objective is to encourage Polish families to have children. The child benefit provides financial support to families by partially covering the costs of raising a child, including childcare and satisfying children’s basic needs. In view of the above, two principal objectives have been assigned to the programme: first, to improve the country’s demographic situation in the context of a low birth rate that does not guarantee generational replacement; and second, to combat child poverty, given that the number of people living in economic poverty tends to increase alongside progressive demographic decline.

The analysis carried out in the article indicates that while the “Family 500(800+)” programme has had an impact on reducing poverty among Polish families, its effectiveness in improving the country’s demographic situation remains limited.

In the first two years of the “Family 500(800+)” programme (i.e. 2016 and 2017), all poverty indicators declined. The material and living conditions of children aged 0–17 (i.e. the beneficiaries of the programme) improved steadily after 2016. Extreme poverty during this period fell from 9% in 2015 to 4.5% in 2019. Nevertheless, despite this decline, poverty reduction has not been sustained. Since 2021, extreme poverty among the youngest has risen again, reaching 7.6% in 2023, corresponding to approximately 522,000 children living in extremely poor households. This represented an increase of 32% compared to 2022. Since the introduction of the benefit, the largest reductions in extreme poverty have been observed among large families with at least three children and single-parent households, while living conditions have deteriorated among families raising one child or two children.

The data presented in the article further indicate that despite the financial support provided, the incidence of extreme poverty has increased across all types of households with children. The primary reasons for this trend are inflation and the resulting erosion of the real value of the child benefit. Consequently, the real value of the benefit has declined by almost 32%. At the same time, it should be noted that in the absence of this benefit, the incidence of poverty would likely be higher.

The analysis also demonstrates that the “Family 500(800)+” programme has been ineffective in stimulating sustained demographic growth. An increase in the number of births occurred only in 2016 and 2017, that is, in the first two years following the introduction of the programme. This increase mainly concerned second, third, and subsequent children, whose share rose at the expense of first births. Since 2018, the number of births has declined, accompanied by a continued decrease in the fertility rate. In light of these findings, it must be concluded that the “Family 500(800)+” programme has not had a significant or lasting impact on

improving Poland's demographic situation. Moreover, it remains difficult to determine whether the benefit directly influenced decisions to have a first or subsequent child.

Finally, it should be emphasised that the COVID-19 pandemic, followed by geopolitical and economic instability resulting from the war in Ukraine, has also contributed to declining in fertility. Nevertheless, despite the overall decline in the number of births and the shrinking population of women of childbearing age, an increase in the number of third and subsequent children born into families was observed between 2015 and 2023.

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