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## **FAMILY AND FERTILITY IN POLAND – CHANGES DURING THE TRANSITION PERIOD**

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### **Abstract**

Poland like other East European Countries experienced a lot of changes in course of demographic processes during the transition period. In this paper the main concern is put on presentation and evaluation of family and fertility changes during the transition period, i.e., years 1989 – 2001. The evaluation of changes in Poland is presented in comparison to the selected European Countries. The paper tries to give answer to the following questions: . How has fertility changed in Poland?; How have family formation and dissolution changed in Poland?; Have the observed changes in the patterns of fertility, family formation and dissolution had an effect on family life cycle in Poland? How should the changes in fertility patterns and the family model be assessed and interpreted?; How is Poland ranking in Europe with her changes in fertility and family?; What are the main problems concerning the family and fertility, which can and should be topics for further discussion in Poland?

## 1. Introduction

Among the three basic demographic processes, which are fertility, mortality and migration, it is fertility that has undergone the most dynamic changes in scale and range in Poland under transition<sup>1</sup>. However, changing fertility is a long-range process, which could be observed at least over the second half of the last century, i.e. over fifty years. Undoubtedly, the economic, social and cultural processes, which we have been witnessing since the late 1980s intensify the transitions of the family and fertility in Poland as well as in many other countries of Central and Eastern Europe(CEE)<sup>2</sup>.

## 2. Fertility changes

Changes in fertility were assessed with estimators related to natality (in other words – birth intensity – birth rates), fertility (fertility rates) and the synthetic measure (total fertility rates). Graphic presentation of the observed changes can be found in Figures 1-5. Natality dropped nation-wide from 30.7‰ to 9.7‰ over the period 1950-2001 (decrease by 69%). The trend in natality reversed many times from the early fifties to the beginning of transformation period. The rate dropped in years 1950-1969, then an upward trend followed till the mid-seventies and it stood at its highest till the end of the decade to fall again. Since 1989 a linear downward trend has followed. Multidirectional changes observed before the transformation period reflect the change in absolute birth number. Such pattern of changes is known in demography as undulation (in other words, translocation) of baby booms and busts. The first post-war baby-boom comprised the generations born in years 1947-1961, with its peak at 793,800 in 1955. The first baby-bust included births of years 1964-1972. The second baby boom was given the name of a baby-boom echo and included the generations of the 1970s and the 1980s. It reached its peak at 723,600 in 1983 (cp. Holzer, Młacki, 1980; Pocięcha, eds., 2003)<sup>3</sup>.

**Fig. 1. Birth rates 1950-2001(births per 1000 population)**

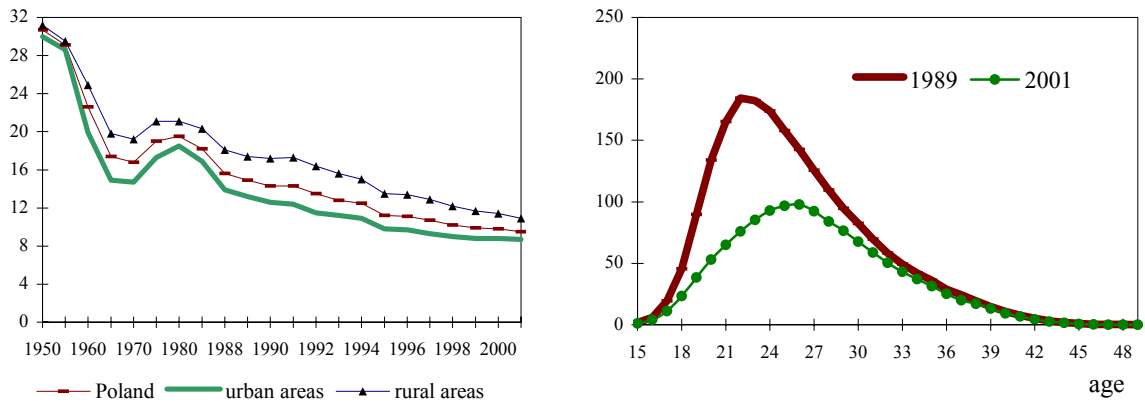
**Fig. 2. Female fertility rates (live births per 1000 females) Poland, 1989-2001**

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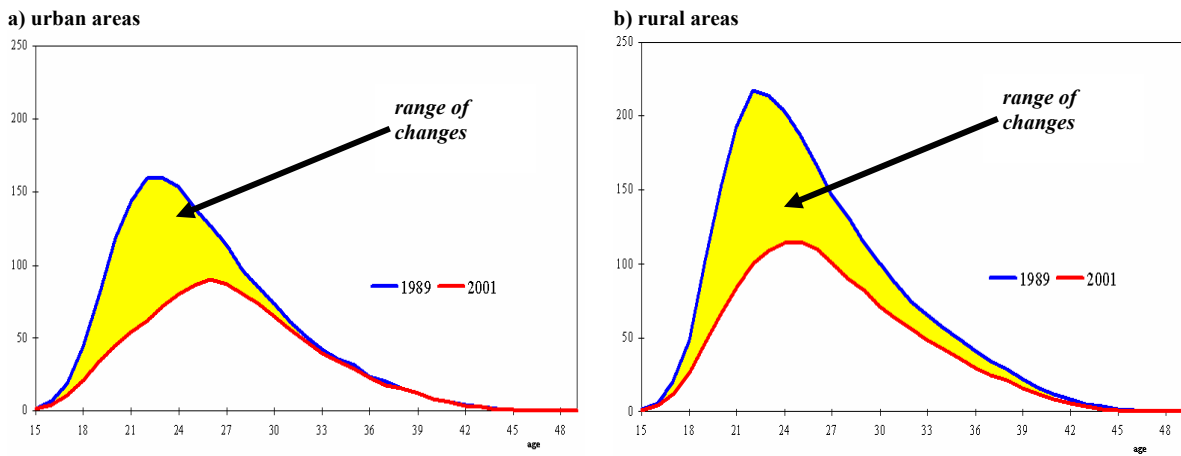
<sup>1</sup> The transition period covers years: 1989 – 2001.

<sup>2</sup> More information on change in fertility in the countries of Central and Eastern Europe can be found in: Sobotka, 2003; Philipov, 2001, 2002; Philipov, Shkolnikov, 2001; Philipov, Dorbritž 2003 and the UN publications, 1999, 2000.

<sup>3</sup> The authors used the stable population model to define the boundaries between baby booms and busts.

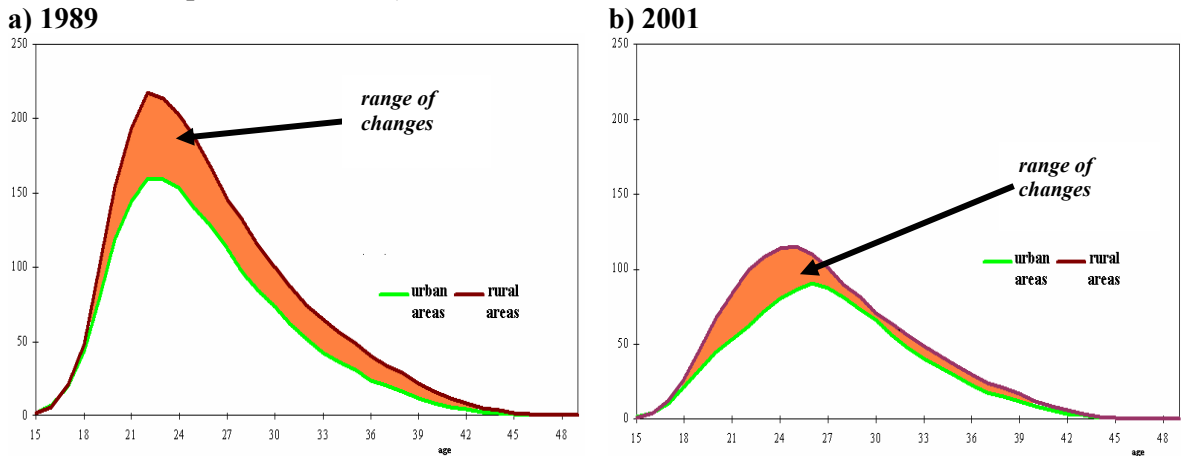


**Fig. 3. Change in fertility pattern 1989-2001 (female fertility rates in years 1989 and 2001 – live births per 1000 females)**

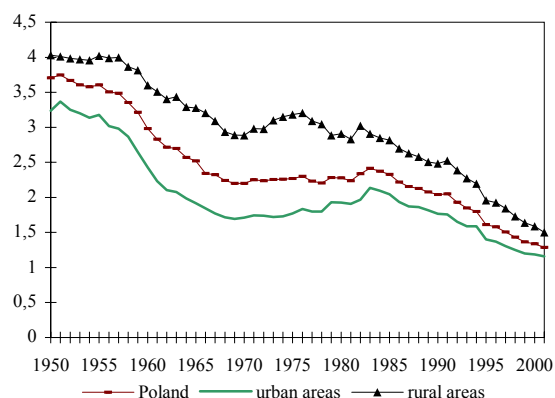


*Source: Own compilation based on CSO data*

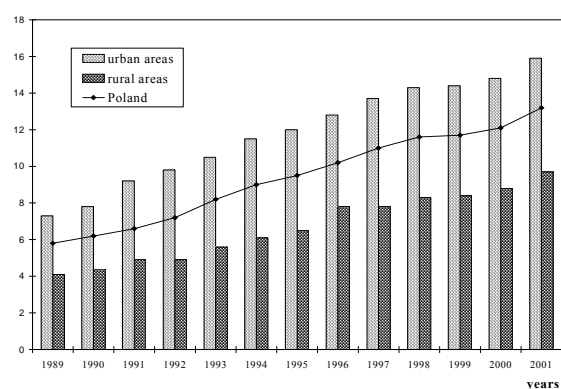
**Fig. 4. Change in fertility pattern 1989-2001 (female fertility rates in 1989 and 2001 – live births per 1000 females)**



**Fig. 5. Total fertility rate (TFR), 1950-2001**



**Fig. 6. Illegitimate births (% of total births)**



*Source: Own compilation based on CSO data*

Change in the model of fertility is a characteristic feature of shifts in fertility, especially under transformation. The notion ‘fertility pattern’ denotes a distribution of partial fertility coefficients (represented by the curves in Fig. 2-4). Changes in fertility pattern in years 1989-2001 viewed both, nation-wide and for urban and rural areas separately, should be regarded as noteworthy and significant. The characteristic features of changing fertility patterns are (see Fig. 2-4):

- 1) declining birth intensity in all age groups;
- 2) age-specific dynamics of fertility decrease;
- 3) equalizing of fertility rates among the groups of the highest fertility (20-24 and 25-29);
- 4) shifted age of maximum fertility (22 in 1898 and 26 in 2001, respectively);
- 5) increase in share of age groups 25-29 and 30-34 in total fertility rate;
- 6) flatness of distribution curve and change in asymmetry of distribution describing the fertility pattern, which produces changed values of distribution parameters;
- 7) increase in average age at first and subsequent births;
- 8) diminishing differences between urban and rural fertility patterns.

Changes in fertility pattern cause decreases in absolute birth number and total fertility rate. Total fertility rate is a synthetic measure of fertility defining lifetime fertility of females. Its value in the interval 2.10-2.15 is defined at existing mortality, as the level ensuring generation-to-generation replacement. This means slightly more than 2 children per woman of childbearing age (15-49) on average. In years 1950-2001 the measure systematically declined, from 3.75 in 1950 to 1.29 in 2001, which is a drop by 65.6%. Over the same period, urban total fertility rate decreased from 3.37 to 1.16 (decrease by 65.5%) and rural – from 4.03 to 1.50, respectively (62.8% decline). It should be emphasized that TFR below 2.1 has been reported in urban areas since 1963. After its growth in the 1970s and the early 1980s (till 1982) up to 2.14, the rate has been systematically decreasing ever since. In rural area TFR settled below 2.1 in 1995, after a systematic decrease started in 1983 (see Figure 5).

Assessed changes allow a conclusion that fertility patterns which can be observed in urban areas are adopted in rural areas some time later. Changes observed in the recent years indicate that the differences between urban and rural areas fade away.

Another characteristic feature of fertility in Poland, as compared with other countries, is still strong, although gradually changing, correlation between fertility and nuptiality, which is reflected by a relatively high share of legitimate births in the total number of live births. For a long time, illegitimate births stood at the same level and their number oscillated around 5%. In the period of socio-system transformation a significant increase in illegitimate births has been observed, from 5.8% (7.3% urban and 4.1% rural areas) in 1989 to 13.2% (15.9% in urban and 9.7% in rural areas) in 2000 – see Figure 6. It is an increase by over 100%. In absolute numbers, it means an increase in illegitimate births from 32,700 in 1989 to 48,600 in 2001.

Thus, we should agree with the opinion of Boleslawski (2002, p. 26) that ‘... regardless of the scale of the phenomenon, illegitimate births are one of the important social problems, and for those concerned – mothers and their children – a source of many strains in life. Only a small proportion of mothers, who decide to have a child out of wedlock, consciously and deliberately choose such life path. Traditional family is still the most desirable life model’. Increases in the absolute number of illegitimate births and their share in the total confirm the progressing changes in the forms of family in Poland. This means, that beside the traditional family, based on marriage, there emerge families based on the principle of consensual union (cohabitation), or a woman takes a decision to have and then bring up the child on her own (this is a decision of the so-called voluntary lone motherhood). It should be presumed, however, that the number of couples (people) who choose to be child-free is growing. However, seeing that there are no relevant nation-wide data, it is impossible to precisely recognize either the range of the phenomenon, or its effect on changes in fertility and family in Poland<sup>4</sup>.

The presented factors defining changes in fertility and total fertility in Poland refer to the so-called cross-sectional dimension (synthetic cohorts). It is worth stressing that changes in fertility and decreased total fertility are also observed in female cohorts born in the 1950s and 1960s. The CSO data display that (*Podstawowe informacje o rozwoju demograficznym Polski*, 2001, p. 19) ‘... total fertility level in female generations of the 1960s (born after 1962) no longer ensures generation-to-generation replacement’. This leads to the conclusion that Poland is experiencing changes in cohort fertility (female generations) displaying an advancing downward trend in fertility and decrease in the cohort TFR. Results from the survey “Female Total Fertility” of 20 May 2002, carried out with the National

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<sup>4</sup> More information on other, alternative forms of married-family life in the postmodern world can be found in the work by Slany (2002).

Census of Population and Housing in 2002 (Form D<sup>5</sup>), will allow a profound and many-sided analysis of cohort fertility.

### 3. Changes in the process of family formation and dissolution

Poland is one of the countries in which family model used to be a traditional one, based on the history of first marriages. Its characteristic feature were marriage universality and a relatively young age of spouses at marriage. Consensual unions were scarce. Another characteristic feature of the model was durability of the marriage. This extreme durability can be confirmed by the fact that the main cause of marriage dissolution was death of a spouse (about 80%), followed by divorce (ca. 20%) – cp. Figure 8. Currently, Poland with divorce rate of 1.2 per 1000 people (2001) is one of the countries with the lowest divorce rate in Europe (cp. Figure 7). Changes which occurred in family formation and dissolution in the past (before 1990) were a gradual modification of the number, sequence and intensity of events related to a greater extent to a nuclear family life cycle (cp.: **Liefbroer, Frątczak, 1996; Frątczak, 1999; Ptak-Chmielewska, 2003**). In the early nineties there emerged some symptoms of change in family formation, and more precisely – first marriage patterns, which turned into permanent behaviour. They can be characterized by:

- changed intensity of first marriages, which confirms diminished tendency to marry;
- lowering values of partial coefficients, especially in age groups: under 19, 20-24, 25-29 and 30-34, which is a sign of diminishing intensity of first marriages;
- increase in mean age at first marriage to about 24 for women and 26.5 for men in 2001,

Lowered values of first marriage rates are the synthetic dimension of changes in family formation pattern. In years 1989-2001 the rates' values dropped from 0.853 to 0.572 for males and for females - from 0.905 to 0.571, respectively. These changes prove that marriage is gradually losing its universal character and the age at first marriage is growing slowly but systematically. While interpreting the rates' values, a fact is worth stressing that in the first year of transformation process about 15% males and 10% females under 50 were never married (which means that 85% of men and 90% of women had experienced their first marriage). In the year 2001 about 57% of males and females under 50 (the gender-specific rates adopted equal values) had experienced marriage. Simultaneously, as many men as women were single. Declining tendency to marry may be attributed to postponing the marriage decision; however, it may also denote a decision of forming a relationship different from marriage. Irrespectively of other circumstances, it denotes a decline in the absolute number of marriages. This results in prevalence of dissolved over newly

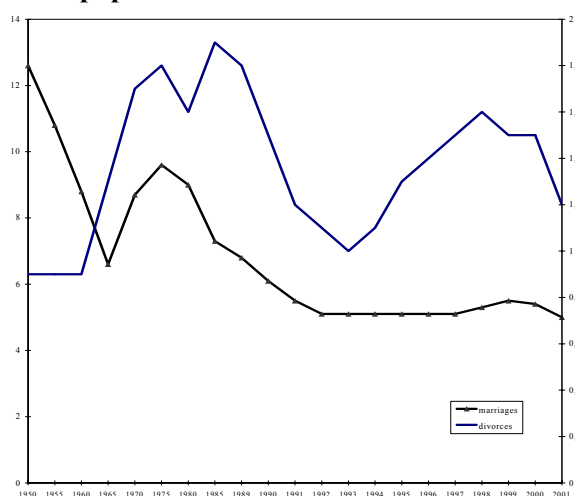
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<sup>5</sup> Cp.: Set of legal regulations on National Census of Population and Housing 2002 and Agricultural Census 2002, CSO, Warszawa 2001, p. 17, 18.

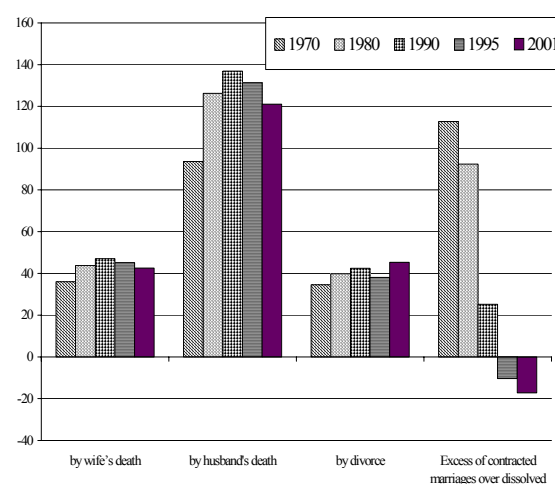
registered marriages, which gives a negative balance of marriages. Value of the negative balance was 17,200 marriages in 2001 (difference between newly registered and dissolved marriages) – cp. Fig.8.

For two years, separation has been one of legal solutions in Poland. Experience shows that it is used more by the residents of urban than rural areas. In 2001, two years after the new law had been introduced, the number of pronounced decisions of separation grew 75% on 2000 (from 1,345 to 2,354). About 80% of separation decisions were related to residents of urban areas. Another observed change is an increase in the number of consensual unions; however, they make a very slow progress.<sup>6</sup>

**Fig. 7. Marriages and divorces per 1000 population. Poland 1950-2001**



**Fig. 8. Marriage dissolution in some selected years (thousands)**



*Source: Own compilation based on CSO data*

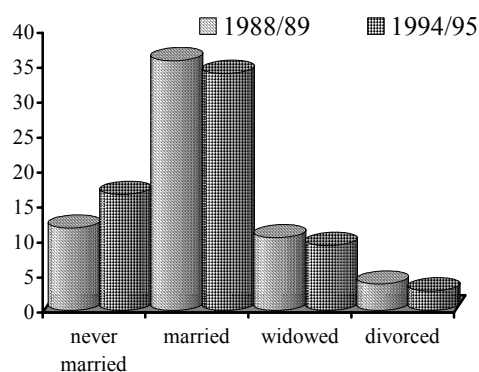
#### **4. How did the observed changes in the patterns of fertility, family formation and dissolution effect family life cycle in Poland?**

It is not easy to answer a question formulated in this way because the registration data available in Poland do not provide suitable basis for such analysis. No permanent surveys are carried out in Poland, which would enable analysis of changes in family life cycle. Therefore, assessment of changes can be referred to model estimates, e.g. family status life tables. This is a formula of a macro-simulation model which allows estimating correlation between such demographic determinants as: fertility, nuptiality, mortality and family size and its structure, i.e. the family dynamics. Estimation of tables for two periods, 1988-1999 and 1994-1995 allows conclusion on the scope of changes in fundamental demographic processes and the way they modified family size and structure over the six-year

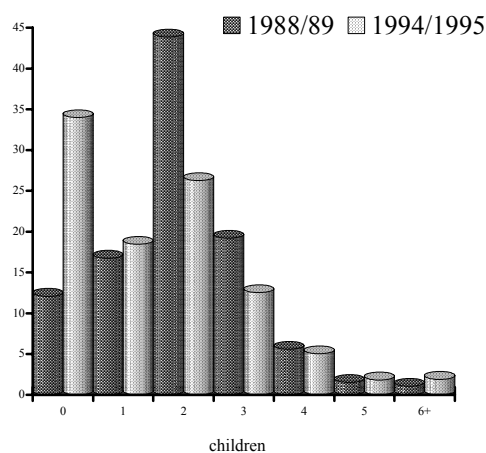
<sup>6</sup> More analytical information on marriage and divorce, especially in years 1989-2001, can be found in the work by Kowalska (2003).

period of early transformation<sup>7</sup>. Figures 9 and 10 present sample estimation results of the family status life table model<sup>8</sup>. Figure 9 displays information on basic changes in female marital status, which were characterized by increased share of women in single marital status, decrease in female shares in married, widowed and divorced statuses. Significant changes are observed in female distributions by the number of children born at the end of procreative career of a woman (at 50). For the distribution of years 1988-1989, which is a unimodal parity-specific distribution, two children have the dominant share. The corresponding distribution for years 1994-1995 has two dominant centres, with the highest shares of zero-parity (36%), to be followed by two-parity (27%). Data included in the tables show that on average in years 1988-1989 there were two children per a woman at 50, while in the period 1994-1995 – 1.5 children, respectively. The results are unequivocal and prove the enormous range and significance of the changes in life cycle over such a short period of time. They inform of fundamental changes in family size and composition over its life cycle that have been observed. The number of single, never married people is growing, the number of children is falling, distribution and sequence of events in family life cycle are changing. Signs of destandardization of family life cycle become visible; however pace of process is very slow. This is a serious warning, which informs of the range of changes occurring in intergeneration relations as well. Another estimation of family status life tables will be possible after the results from the National Census 2002 have been processed and beyond all doubt it will deliver information on further change in family life cycle in Poland.

**Fig. 9. Expected durations of stay in different marital statuses (females aged over 15)**



**Fig. 10. Distribution of females aged 50 by parity**



Source: Own calculations by E. Frątczak 2001.

<sup>7</sup> Cp.: Frątczak, 2001. Publication includes a theoretical description of family life table model, the data serving as a base for estimation and analysis of some selected results from estimation of the model.

<sup>8</sup> Estimated model is included in the group of the so-called *female dominant models*, in which woman is a marker, i.e. the individual who allows to identify the family.



## **5. The possible interpretation of changes in fertility patterns and the family model**

Assessment and interpretation of changes in fertility patterns and family model are complex and cannot be only confined to demographic arguments. Mechanism underlying the changes depends on many processes, very often co-occurring. Therefore, explanation of changes should be principally based on the cause-and-effect mechanism, which necessitates permanent, multidisciplinary monitoring of the processes and their transition. Valuation of changes should also refer to the well-known theories useful at interpretation. At least two out of the many possible approaches to assessment of changes could be mentioned, the ones using:

1. empirical analyses and model estimations;
2. some selected theories.

### ***Empirical analysis and model estimation***

The macro-simulation model of family status life tables, as mentioned in point 2, is an example of such an approach. It not only provides the possibility to measure demographic determinants, but also the results from model estimation can serve as a base for assessment of changes in intergenerational relations: children-parents-grandparents. Application of the Bongaarts-Feeney formula to assess changes in fertility and first marriages process is another example of a model estimation and empirical analysis at the same time.

The essence of the formula proposed by Bongaarts and Feeney is measuring the ‘quantum effect’ by eliminating the distortion generated by the ‘tempo effect’ from the cross-sectional TFR. The result of ‘quantum effect’ measure has been given the name ‘tempo-adjusted TFR’, which can be, in other words, called an ‘adjusted cross-sectional total fertility rate’<sup>9</sup>. It is essential for the formula that all distortions generated by shifts in birth timing are eliminated.

Construction of the cross-sectional TFR comprises the following constituents:

- 1) quantum component, defined as a TFR which would be observed if no changes occurred in distribution of childbearing timing over the period for which the rate is measured;
- 2) tempo component, measuring distortion related to changes in distribution of childbearing timing; it is expressed through changes in the mean age at a given birth order.

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<sup>9</sup> Tempo-adjusted TFR, at the assumption that timing of childbearing does not change in a given year, can be estimated by dividing the observed TFR for  $i$ -th birth order by  $(1 - r_i)$ , where  $r_i$  is a change (in years) in mean age at childbearing at order  $i$  during the calendar year. A detailed description of the method can be found in works by: Bongaarts, Feeney, 1998, p. 271–291; Frątczak, Ptak-Chmielewska, 1999.

Application of this formula to fertility (and more precisely, the general TFR and the TFR decomposed by birth order) and to nuptiality (and more precisely, first marriages' rate) allowed to define and measure the tempo effect. In other words, we have obtained an answer to the question, what the hypothetical TFRs would be if childbearing and first marriage were not postponed. Relevant results have been presented in Figures 11 and 12 and in Table 1.

### ***Interpretation of TFR-related results***

Results obtained from application of the Bongaarts-Feeney's formula to Poland (1989-2001) have been presented in a graphic form in Figure 11<sup>10</sup>. Each of the diagrams demonstrating results from empirical application of the formula includes three sets of information: calendar years (X-axis), TFR (left Y-axis) and average age (right Y-axis). Curves in diagrams represent changes in the cross-sectional TFR, adjusted TFR and mean age of females, as observed in years 1989-2001.

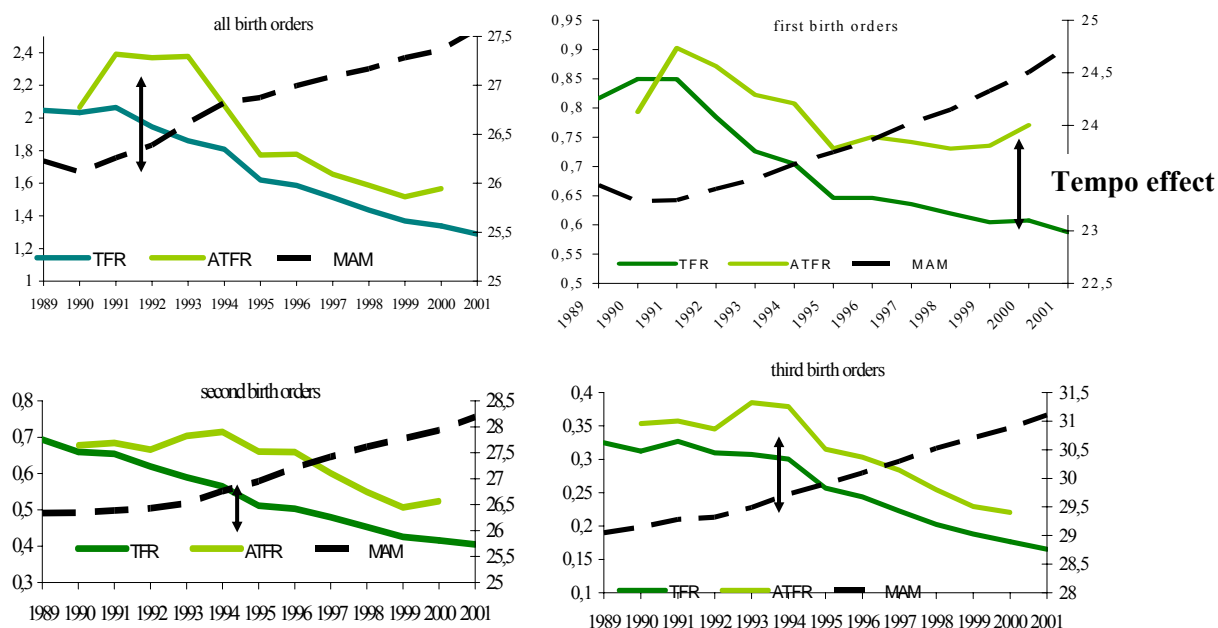
Results from estimation (cp. Fig. 11) unequivocally prove that taking into account all births, average age of women at birth grew by over a year (from 26.2 to 27.6) in that period. The observed TFR, which showed a tendency to stabilize in years 1989-1991, was systematically sliding from 1992 (level of 1.95) to the end of observation period, i.e. 2001 (level of 1.29). The value of adjusted TFR rose in years 1990-1991 and then, in the period 1991-1993, it stood around 2.4 to fall steadily from 1994, with a slight increase in the last year. Discrepancy between the values of adjusted and observed TFRs was the biggest at the beginning of the observation period, i.e. in the years 1991-1993. Adjusted TFR for 1990 was only 2% higher than the observed TFR. In the subsequent years, the differences are bigger and reach, respectively: 16% in 1991, 22% in 1992, 28% in 1993 and 14% in 1994. Over the recent years (1995-2001) a nearly 10% prevalence of the adjusted TFR and the observed TFR stabilization can be observed. The obtained results allow a thesis that in the early transformation period, and more precisely in 1990, the 'tempo effect' did not occur. It was the strongest in years 1991-1995 and it stabilized in the next period, i.e. 1995-2001.

In first birth orders, the gap between the adjusted and observed TFRs gradually widens in years 1991-2001. In 1991, the adjusted first-order TFR exceeded the observed rate by 6%, the difference reached 17% in 2000, respectively. In the period under investigation, an average age at first birth grew by 1.3 years.

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<sup>10</sup> More detailed information of empirical results of the application, the method itself and valuation of the results can be found in works by: Frątczak, Ptak-Chmielewska, 1999, Frątczak; 2003.

**Fig. 11 Total fertility rates according to Bongaarts-Feeney's formula (all birth orders, first, second and third birth orders)**



Total fertility rate:  
 TFR – observed,  
 ATFR – adjusted,  
 MAM – mean age at motherhood;

Source: Own calculations by E. Frątczak and A. Chmielewska-Ptak, based on SCO data.

Results for the second birth order clearly show the correlation between the gap between the TFRs and shifts in the mean age of women. In the early period under observation, i.e. in years 1990-1992, when the TFRs differed insignificantly, mean age at second parity birth was growing very slowly. The discrepancy between the TFRs was growing rapidly along with the mean age of the woman. The prevalence of the adjusted over the observed TFRs was 26% in 1994 and 31% in 1996, respectively. Mean age of a female at second parity birth grew by 1.85 years over the period under study.

In third parity births, the biggest difference between the observed and adjusted partial TFRs occurred in years 1992-1993. Adjusted TFR exceeded the observed TFR by nearly 25%.

In the case of the first, second and the third parity births, the partial TFRs show downward trend, while in the case of fourth and fifth parity births (cp.: Fig. 11 and E. Frątczak, 2003) the observed partial TFRs climb from 1989 to 1994 and then they decrease markedly. Mean female age at fourth birth order grew by nearly 2 years over the observed period, and by 1.2 years at fifth and subsequent birth orders, respectively. Increase in the mean female age is observed in all birth orders, from first to fifth, inclusive.

For the subsequent birth orders, from first to fifth and for the total births, adjusted TFRs were higher than the corresponding observed TFRs. Therefore, a conclusion can be drawn that changes in birth timing due to postponed childbearing

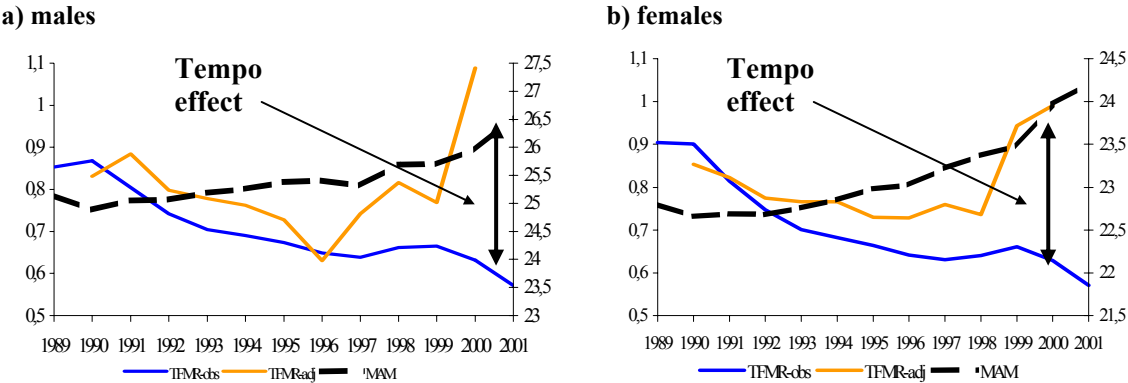
decision encourage the downward trend in the observed TFR. The correlation between observed and adjusted TFRs, which shows that the latter rate adopts higher values, allows a conclusion that the downward trend in total fertility in Poland has not been completed yet. It should be expected that shifts in birth timing may still strongly encourage downward trend in total fertility in Poland.

**Interpretation of results with reference to first marriage rates**

Another feature of demographic transition in Poland under transformation period is a diminishing tendency to marry, which is one of the factors stimulating change in fertility and downward trend in births.

Changed nuptiality pattern is characteristic of a steady downward trend in first marriage intensity, postponing family formation, which leads to increase in mean age at first marriage. Comparison of the observed and adjusted rates is an attempt to explain and describe the changes in first marriages in a way which would enable measuring the ‘tempo effect’. Relevant results are included in Figure 12 and Table 1.

**Fig. 12 Cross-sectional first marriages rates – observed and adjusted – and mean age at marriage**



Total first marriage rate:  
 TFMR obs – observed  
 TFMR adj – adjusted  
 MAM – mean age of marriage

Source: Own calculations by E Frątczak and A.Chmielewska-Ptak, based on SCO data.

**Table 1. Cross-sectional first marriage rates (*TFMR-obs*), adjusted cross-sectional first marriage rates (*TFMR-adj*), mean ages at marriage (*MAM*) for men and women, 1989-2001**

Specification	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001
	<b>First marriages – males</b>												
<i>TFMR-obs</i>	0.853	0.868	0.805	0.742	0.704	0.69	0.673	0.649	0.638	0.661	0.665	0.631	0.572
<i>MAM</i>	25.14	24.89	25.05	25.07	25.19	25.26	25.38	25.41	25.32	25.69	25.7	25.96	26.54
<i>TFMR-adj</i>		0.831	0.885	0.798	0.778	0.762	0.727	0.630	0.742	0.816	0.769	1.088	
	<b>First marriages – females</b>												
<i>TFMR-obs</i>	0.904	0.901	0.814	0.747	0.701	0.682	0.664	0.641	0.631	0.64	0.661	0.629	0.571
<i>MAM</i>	22.8	22.66	22.69	22.68	22.76	22.85	22.98	23.03	23.22	23.37	23.48	23.97	24.21
<i>TFMR-adj</i>		0.854	0.822	0.774	0.766	0.766	0.729	0.728	0.760	0.736	0.944	0.990	

Source: Own calculations by E Frątczak and A. Chmielewska-Ptak, based on SCO data.

Differences between the observed and adjusted rates in years 1989-2001 were slightly higher for women than men, which may mean that females are more engaged in changing the first marriage pattern than males. Over the studied period, an average age at first marriage grew by 1.4 years on the average, for both genders. However, the increase in the mean age was slightly higher in females than males over the recent years (cp. Table 1, Fig. 12).

The gap between the adjusted and the observed first marriage rates has been widening in the recent years. The differences grow swiftly beginning with 1999 for males and 1998 for females to reach the level of 50% in 2000. This shows that transition of the first marriages pattern in Poland has not been completed yet and further shifts should be expected. The observed changes lead to transition of the marital status of Poland's population.

### ***Some selected theories***

Range of theories which can be used to support interpretation of changes in fertility and family in Poland is fairly extensive. Selected theories can be referred to certain groups of factors:

- 1) socio-economic (like: increase in alternative costs of having a child, relative deprivation, increased demand for education:
  - new home economics, Becker, 1991,
  - relative deprivation theory, Leibenstein, 1976; Esterlin, 1968, 1973,
  - human capital theory, Becker, 1993,
  - social capital theory, Coleman, 1990;
- 2) ideological – connected with changed norms, values and attitudes affecting the tendencies and decisions related to fertility and family (inclusive of

those referring to the phenomenon of the ‘social anomie’ and the undesirable changes which discourage desire to have children by the increased uncertainty, lack of confidence:

- diffusion processes and theory, (Mongomery, Rogers, 1995; Casterline, 1996, 1998,)
- social interaction theory, (Kohler, 2001)

3) a separate group of theories, particularly useful while interpreting the changes, comprises the theories of low fertility – their fundamental goal is to understand the causes and motives, and more generally speaking – the essence of low fertility.

Poland, with its TFR at the level of 1.29 in 2001 belongs to a group of countries with the so-called very low fertility. Demographic literature does not offer one, standard classification of countries by the fertility level, but convenient classifications are adopted to serve certain analyses. So, the UN Population Division in New York, which prepares demographic projections for countries, continents and global populations to serve practical purposes, sorts out the countries by the TFR criterion as follows: 1.5-2.1 – low fertility; below 1.5 – very low fertility. In the works by Ortega, Kohler, 2000; Kohler, Billari, Ortega, 2001, an assumption was adopted that the TFR at the level of 1.3 and lower is labelled as a very low fertility.

McDonald (1996, 2000a, 2000b, 2000c 2002) includes the following concepts in the group of low fertility theories:

- rational choice theory,
- risk aversion theory,
- post-materialist values theory,
- gender equity theory.

Short characteristics of the four theories will be presented below, as based on the already-mentioned works of McDonald.

### ***Rational choice theory***

Theory of rational choice states that the decision to have a child is based on calculation in which advantages of having the child outweigh the costs. The costs can be considered in the terms of money, while the benefits are mainly of psychological nature and not clearly quantifiable. In psychological dimension, a net benefit appears if the gains outweigh the costs. The role and significance of costs and psychological gain vary depending on the child’s birth order. The highest level of psychological gain accompanies the first child. Dimensions of these gains differ depending on which child’s birth in order the decision concerns. Simultaneously, in

a situation when the economic cost of having a child grows, psychological net benefit of having a child may be annihilated and the decision of having another child will not be made. Psychological costs of having a child probably grow with age – the older a person, the less meaningful benefits from having an additional child are, and thus the tendency to have one more child may become weaker and weaker.

Costs related to having a child may be direct or indirect. The direct costs comprise the real child-related expenditure reduced by the tax allowances, if such are available under the taxation system in force. Indirect costs are the pays lost over the time devoted to childbearing and child care. The range of direct and indirect costs is related to the birth order. They are, as a rule, the highest with the first child. It has been proved that indirect costs go down in those societies, in which it is possible to combine occupational activity with child care. Lower indirect costs may be a partial explanation of the fact that fertility in countries of a high rate of economic activity among mothers exceeds fertility level in countries of low women's economic activity (cp. Coleman, 1998). Following conclusions related to family policy can be drawn on the base of the rational choice theory. (McDonald 2002, p.423-424): *'... if we wish to have a positive impact on fertility decision-making, we should try to raise the psychological benefits thresholds or reduce the economic cost of children. The first is not readily amenable to policy, although a general sense that a society is child-oriented or child-friendly probably has some effect in raising thresholds. If children are always portrayed as a negative (threats to a good relationship, obstacles to having a good time, potential drug addicts or delinquents) or if social institutions do not make allowances for the possibility that a person has children ('no dogs or children allowed'), then thresholds will tend to be lower. Encouragement of earlier childbearing could also be a way in which psychological thresholds might be raised. There is no question that the remarkable different history of fertility in the United States in the 1990s and its maintenance at a higher level than in any other industrialized country is related to the much earlier onset of childbearing in the USA. (cp. Publications by Leathaeghe and Moors, 2000; Frejka and Calot, 2000).'*

### ***Risk aversion theory***

The core of the theory is related to the rational choice theory, but the context is different. The theory assumes that the costs and benefits will come in the future; therefore our understanding and ability to assess future effects of our decision are low. Decision of having a child is a decision changing future life course and it depends on how the future is perceived. If the social and economic future is perceived as uncertain, people make decisions so as to secure their future.

Uncertainty may be more and more often connected with lack of economic stabilization, or job security and strong economic cycles of booms and busts. The risk aversion theory assumes actions which are meant to secure against the risk, like permanent education, sustaining economic activity as long as possible, saving money, bearing also in mind future uncertainty connected with having and upbringing a child. Examples of growing economic uncertainty accompanying economic cycles related to a better or worse economic situation in a country are mentioned by Hoem (2000), Coleman (1998), Hobcraft (1996). Risk aversion may also refer to social or typically intimate spheres. There is a risk that having a child may disrupt the relationship between parents (partners). Lack of friendly, child- and family-supportive social atmosphere may instigate decisions designed at the state's limiting the support given to families. In this kind of situation decisions to restrict a number of children will be the normal one. Another personal decision aimed at averting risk will be avoiding the decision to marry and form a family. According to McDonald (2002, p. 426) *'Risk aversion is not readily amenable to policy initiatives. Insurance is a conventional approach to other forms of risk, but its use is certainly not common with regard to the risks associated with raising children. Generally, families with children spend almost all of their money or they spend more than they have (dis-savings). Thus, the prospect of substantial expenditure on insurance against the broad range of risks of having children is difficult to contemplate. A well-developed welfare state is a more common way of smoothing out risk of this sort. Job loss is covered by social security arrangements, services for children are costless or subsidized, unforeseen health costs are covered, and so on. The present direction of social policy, however, is to pass the risk and the costs back on to individuals and families and away from the state. Greater employment security would also reduce the risks involved in having children, but, again, the direction of industrial policy is to release the employer from obligations to the employee. The direction of social and economic policy in almost all industrialized countries is to increase, rather than to reduce, the risk that people face.'*

### ***Post-materialist values theory***

Post-materialist values theory is related to the concept of second demographic transition (Lesthaeghe R. (eds.), 2002, 1998, 1995, 1991, 1983; Lesthaeghe and Moors, 1996; Lesthaeghe R., J. Surkyn, 1988; Van de Kaa D., 2002a, 2002b, 2001, 1994, 1987). The theory is based on an assumption that changes in social and demographic values are caused by the fact that individuals attach increasing significance to such values as self-realization, satisfaction of individual preferences, liberalism or freedom from the traditional patterns as imposed by religion. A classical work describing the changes is a publication of Inglehart (Inglehart, 1977), in which transition from purely material issues to the so-called higher-order, 'post-



materialistic' concerns in modern, affluent societies is pointed out. Change in the system of values, or more widely, transformed norms, attitudes and behaviours, transition from traditional to more liberal behaviours are associated with increased divorce, cohabitation and illegitimate birth rates. Novel behaviours are much more widespread in liberal societies (Scandinavian and English-speaking countries) than in traditional ones (Germanic and South-European cultures), cultivating strong family bonds.

The mechanism which pushes the values in post-materialist direction affects demographic trends, inclusive of fertility, in many ways. Results from 'World Values Surveys' and 'European Values Surveys' provide systematic data allowing to carry out such a reasoning (cp. Inglehart et al., 2000). Theoreticians vary in their opinions on whether post-materialistic values are of such significance, that they might have caused change to fertility patterns and, as a consequence – decline in fertility. (cp. Coleman 1998). Because this concept is included in the group of theories which are meant to help explain changes in basic demographic processes, as described in the concept of the second demographic transition, it is well-known in demographic environment. However, there are no demographic studies which would cover on a large scale the issues connected with the broadly-defined norms and values (Polish retrospective survey 2001 was a forerunner of a new direction in studies in this area). The recent years have brought many new publications and reinterpretations related to the post-materialistic values theory (Haller 2002; Hoffmann-Nowotny, Fux, 2001; Mariański (eds.) 2002).

### ***Gender equity theory***

The theory and the mechanism associated with it were described in detail in two works by McDonald (2000a, 2000b, 2002), with the arguments referring mainly to Australia. The essence of equity consists in dividing the gender equity into two components: gender equity in family-oriented and individual-oriented institutions. There is a correlation between decrease in fertility and the family's transition from high to moderate gender equity levels. Increase in female's power to make decisions concerning their fertility on their own is an essence of this transition. The moderate fertility rate and increased control of a woman over her own fertility are associated with a rapidly growing gender equity in individual-oriented institutions which leads towards very low fertility rate. If there is a mix of high gender equity in individual-oriented institutions (education system, labour market) and a relatively permanent gender equity in family-oriented institutions (inclusive of a family itself) it leads to decline in fertility rate. Under the gender equity theory a hypothesis is put forward (Mc Donald, 2002, p. 428-429 ) that *'fertility will only rise from very low levels if gender equity moves to high levels in family-oriented institutions, that is, if*

*the male breadwinner model of the family ceases to be the assumption upon which family-oriented institutions are founded. The transition from very low fertility to low fertility will be easier for the liberal countries. Indeed, some countries that are more liberal in their family orientation may never actually experience very low fertility (Norway is probably the leading candidate for this description).'*

Relations between institutions of the two types and their links with the preferred or supported family model are intrinsic to gender equity. In the states, where the male-breadwinner model was common, social institutions were established against a background of gender inequity. Changes observed since 1960s, common availability of education, bigger economic activity of women, relatively equal opportunities on labour market instigated development of social institutions of a different type. However, these institutions are not always transformed in a way which would ensure coherence between family- and individual-oriented institutions (when the dual-earner model becomes more popular). This incoherence, associated with a given policy model, may result in lower fertility. Sample descriptions of the problem can be found, among others, in works of Esping-Andersen (1998) and Chesnais (1998).

All four above-mentioned theories can be used to interpret the changes, which occurred in Poland in the areas of fertility and family. They may be also taken into account while working out the assumptions of family-oriented policy in Poland.

## **6. How is Poland ranking in Europe with her changes in fertility and family?**

Demographic processes in Poland, like in many other countries of Central and Eastern Europe, went on without any distortions till the end of the 1980s. It was only the system transformation, initiated in 1989, that instigated major changes in most demographic processes in this part of Europe. Answer to the so-posed question will be given through comparison of some selected measures characterizing fertility and trends in first marriages in 2000. Selected European countries have been divided into two groups: EU countries (15 countries) and the applicant countries (8)<sup>11</sup>. Each of these groups breaks into three subgroups: of equal, higher, or lower rates than those observed in Poland. Results of the comparisons have been presented in Maps 1-12.

1. Out of the EU countries, Austria has total fertility at a level close to that occurring in Poland. Decisive majority of the EU countries (10) had TFR higher than Poland. Four EU countries: Greece, Spain, Portugal and Italy were characteristic of lower total fertility than Poland. Comparison of Poland's total

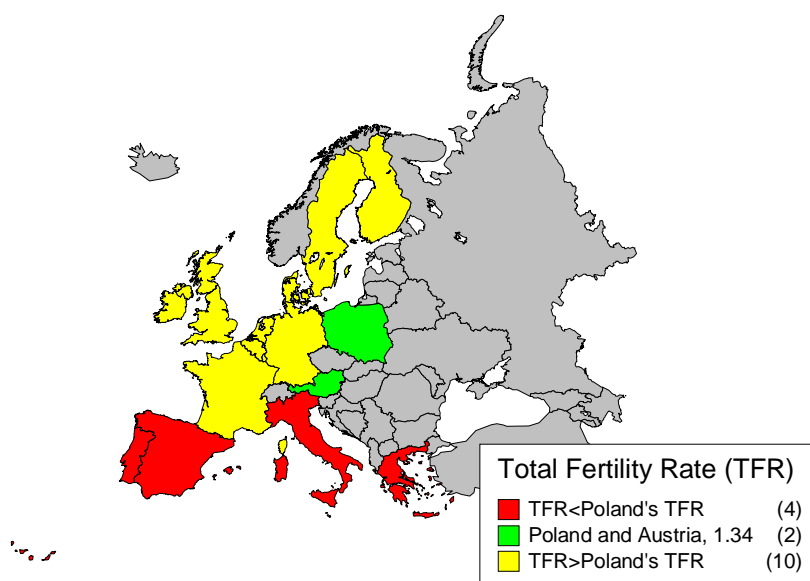
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<sup>11</sup> Cyprus and Malta were not taken into account in the group of applicant countries, as the countries were hardly discernible while preparing the maps.

fertility with the corresponding levels in the other EU applicant countries indicates that most countries (6 of them) are the countries of lower total fertility than observed in Poland. Only Estonia has total fertility higher than Poland's, but the difference is not big. Hence, Poland is different from both, EU and the candidate countries with regard to total fertility level. The presented distributions allow a statement that Poland, with her total fertility level is closer to the candidate than the EU countries (cp. Maps 1 and 2).

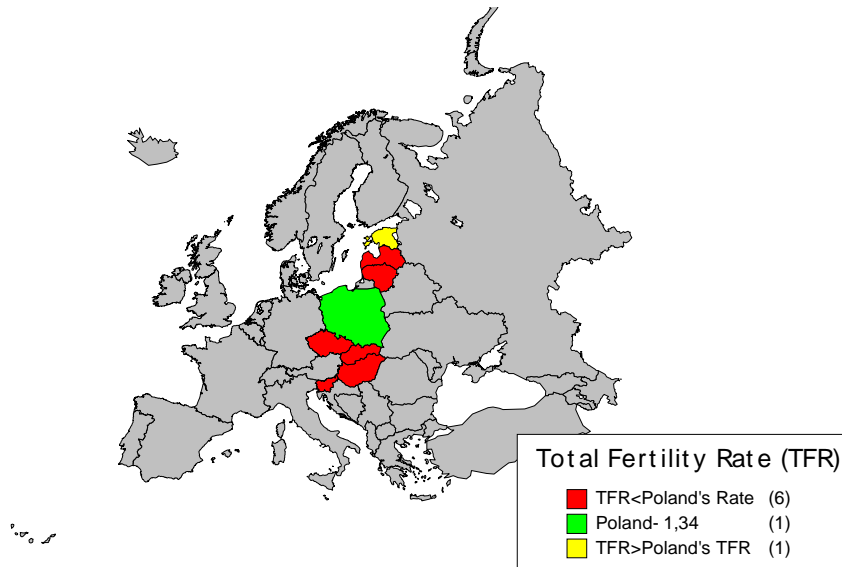
2. Another characteristic related to fertility, and more precisely, fertility pattern, is the ages at first birth and n-th birth order (cp. Maps 3-6). Both indicators were higher in all 15 EU countries than in Poland. However, the situation in the group of candidate countries was as follows: almost half of the countries had a female age at first birth higher and almost half of the countries had it lower than Poland. The mean age of a female at first birth was lower than in Poland in a decisive majority of applicant countries (6). (cp. Maps 5 and 6). It may be deduced that the Polish fertility pattern differs from the patterns observed in both, the EU and the applicant countries with regard to this one characteristic. Poland's position is between the patterns characteristic for the culture and traditions of Western Europe which denote late motherhood and the patterns typical of the culture and tradition of Eastern Europe, which imply young motherhood. It can be stated that Poland is on her way from Eastern to Western traditions in the process of the pattern transition.

**Map 1. Total Fertility Rates Poland – European Union**



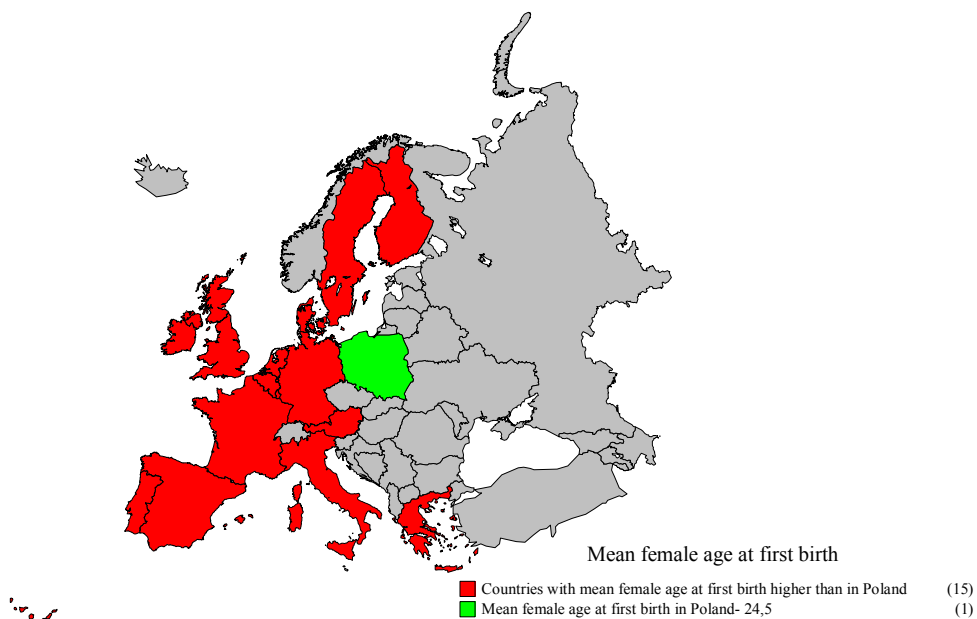
*Source: Own compilation based on: Recent Demographic Developments in Europe, Council of Europe Publishing, Strasbourg 2001.*

### Map 2 TFRs: Poland-Candidate countries



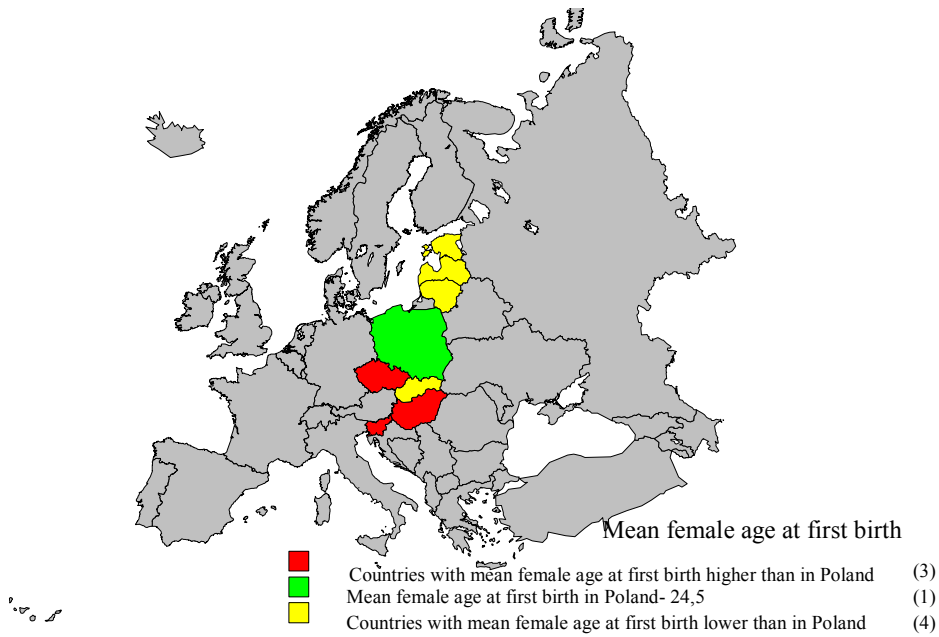
Source: Own compilation based on: *Recent Demographic Developments in Europe*, Council of Europe Publishing, Strasbourg 2001.

### Map 3. Mean female age at first birth: Poland – European Union



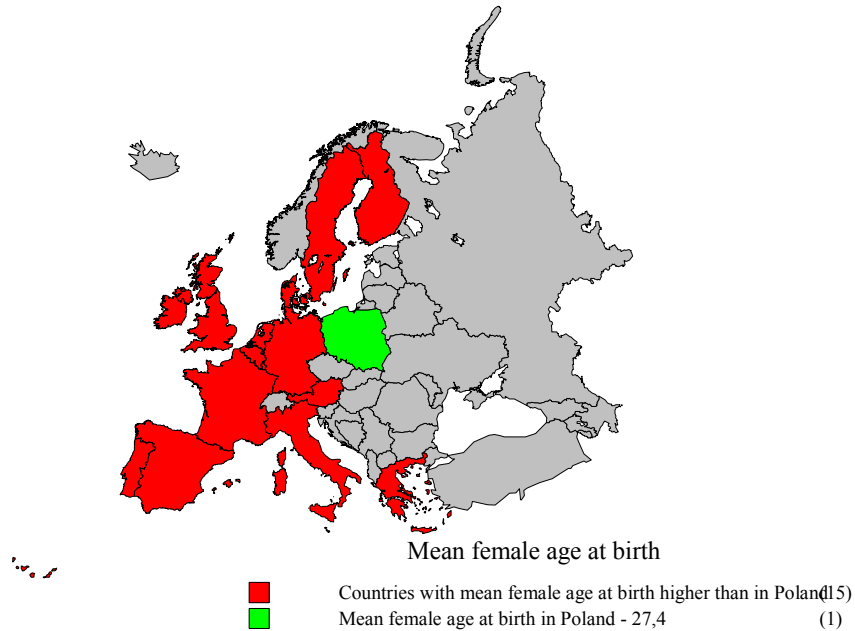
Source: Own compilation based on: *Recent Demographic Developments in Europe*, Council of Europe Publishing, Strasbourg 2001.

**Map 4 . Mean female age at first birth: Poland – Candidate Countries**



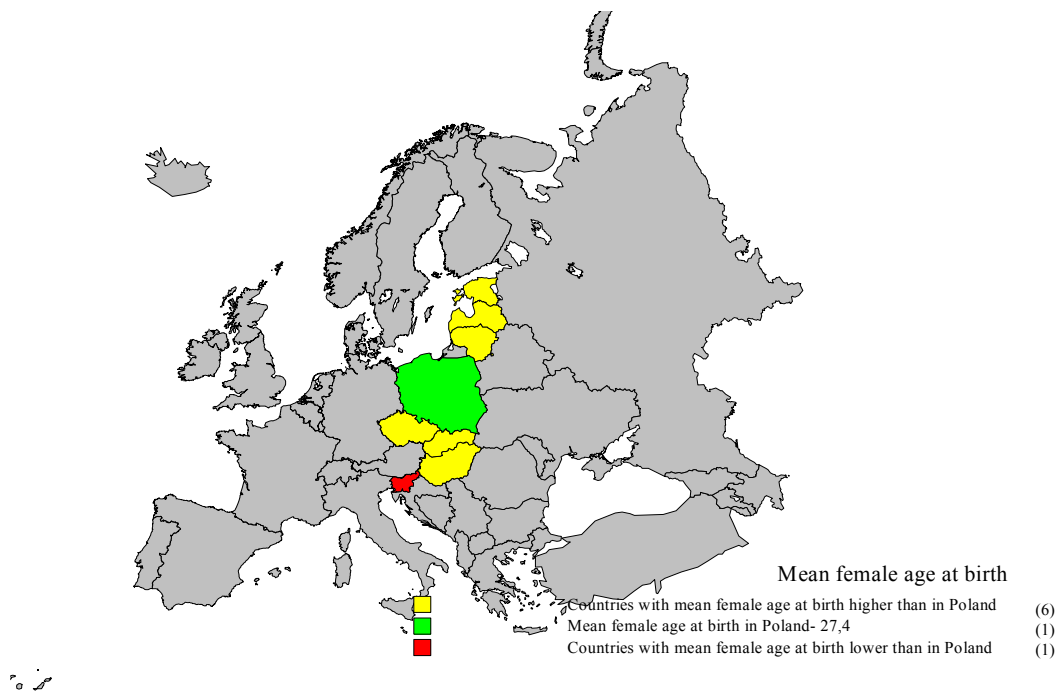
*Source: Own compilation based on: Recent Demographic Developments in Europe, Council of Europe Publishing, Strasbourg 2001.*

**Map 5. Mean female age at birth: Poland – European Union**



*Source: Own compilation based on: Recent Demographic Developments in Europe, Council of Europe Publishing, Strasbourg 2001.*

## Map 6. Mean female age at birth: Poland – Candidate Countries



Source: Own compilation based on: *Recent Demographic Developments in Europe*, Council of Europe Publishing, Strasbourg 2001.

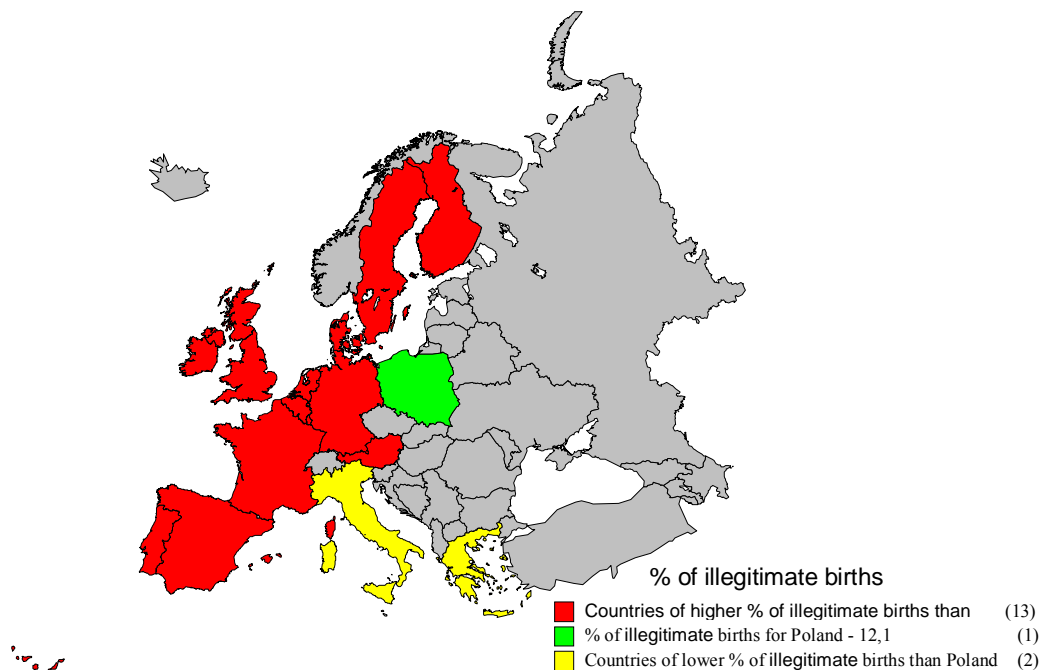
3. Share of illegitimate births in the total of live births is an indicator, which informs not only of the changes related to fertility but it carries the information indirectly confirming emergence of new forms of unions and families. Discriminating the countries by this rate (cp. Maps 7 and 8) displays that all the applicants and decisive majority of EU countries (13) have bigger proportion of illegitimate births than Poland. Countries with lower illegitimate births' percentages than Poland are Greece and Italy. This shows another discrepancy between Poland and both, East and West of Europe, however, as it has been mentioned in answer to the first question, dynamics of illegitimate births was relatively high and it grew by over 100%. The arguments to support the thesis of Polish diversity comprise our religion-related tradition and the highly perceived values of marriage and family.
4. Two other characteristics – first marriages rate and mean female age at first marriage show the similarities and differences related to the first marriages pattern (cp. Maps 9-12). Decisive majority of the EU countries, except Denmark and Portugal, when compared with Poland, are characteristic of lower first marriages rates and a definitely higher age of women at marriage. Simultaneously, the candidate countries have the first marriages rates at the level close to Polish. Half of the countries in this group are characteristic of a lower, while the other half – of a higher age of women at first marriage than the one observed in Poland. Contrasting Poland with the two groups of countries allows a conclusion that Polish pattern of first marriages is closer to the one observed in the candidate rather than the EU countries.

Poland's changes in fertility (and more precisely, fertility pattern) and family formation and dissolution (or family formation and dissolution pattern) differ in many respects from the patterns observed in other developed countries, and especially those described by the authors of the second demographic transition (D. Van de Kaa, R. Lasteaghe – list of publications in the enclosed biography). However, comparison of some selected measures displayed that Poland is also different from the CEE applicant countries. This means that the observed changes and the present situation compose a '*unique Polish path of fertility and family transition*' which differentiates our country from the countries of Western Europe and the CEE candidate countries. This divergence undoubtedly deserves separate multidisciplinary surveys and studies. Obviously, full reasoning behind discrimination of the '*unique Polish path of fertility and family transformation*' cannot be quoted here, as it is a subject to separate publication. We will only touch on some selected arguments to illustrate the essence of discussed process. It should be clearly emphasised that the differences concern both, fertility and family. The EU countries are the benchmark for the assessment of changes.

1. The first discriminating characteristic is the pace and range of changes in fertility and the mechanism underlying the changes. Alleged differences in the scope of changes are presented in Fig. 16. Transition from the TFR ensuring simple generation replacement at the level 2.4 to below-replacement TFR (1.5) took Poland 14 years. In the UN countries the period lasted 27 years. This means that transition within the defined limits was two times shorter than in the EU countries. Discussing the scope of changes, we mean the TFR values currently observed in Poland. Decisive majority of the EU countries have TFRs higher than the one reported in Poland, i.e. 1.34 in 2000 (and 1.29 in 2001, respectively).
2. Another difference is reflected, above all, by the fact that marriage is still a dominant form of family. Durability of marriages, and especially first marriages, is much stronger in Poland than in Western Europe. Marriage is no longer a prevailing form of relationship in most EU countries. It coexists with many other forms of union, such as cohabitation.
3. Strong correlation between fertility and nuptiality is another attribute discriminating Poland from the EU countries. This strong correlation leads to decrease in fertility (changed family formation patterns connected with postponing marriage result in postponing birth of the first child, and as a consequence – lower fertility).
4. A relatively low number of cohabitations is another dissimilarity. Data provided by the subsequent censuses display that cohabitations constitute a small proportion of all couples living together. In 1988, their share in total marriages was 1.2% and in 1995 (data from micro-census) – 1.7%, 2.0% in urban and 1.1% in rural areas. Observations show a slight increase in the percentage of cohabiting couples over the inter-censuses period. *Family and Fertility Survey*, carried out in Poland in 1991 (Holzer, Kowalska, 1997), displayed that 4.7 % of people aged 18, or over in a population consisting of

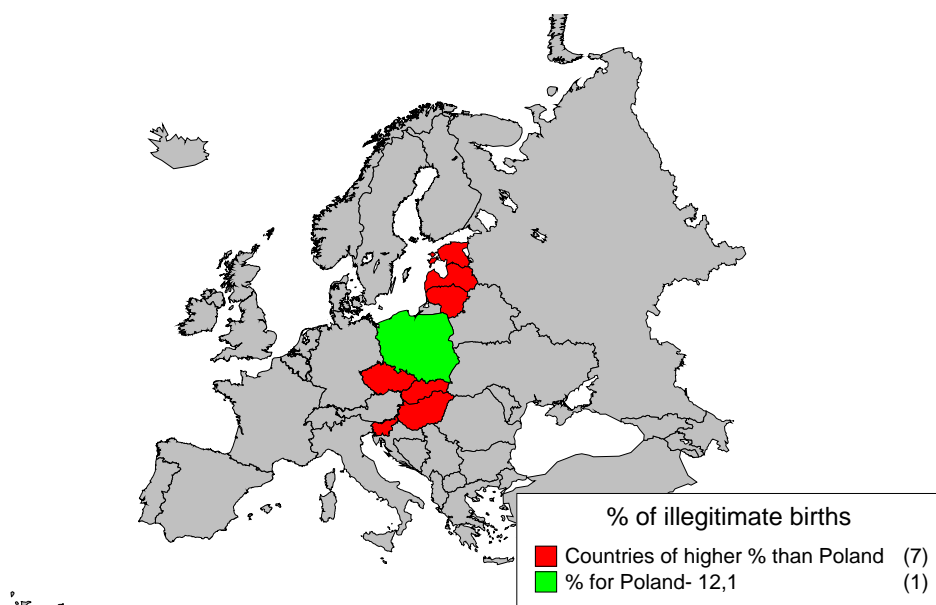
8,544 people had experienced cohabitation. Most of them were the people who had lived through unsuccessful first marriages. This shows a fundamental difference between Poland and the countries of Northern and Western Europe, in which cohabitation is more often a form of partnership prior to first marriage, a form of family.

**Map 7. Share of illegitimate births: Poland- European Union**



*Source: Own compilation based on: Recent Demographic Developments in Europe, Council of Europe Publishing, Strasbourg 2001.*

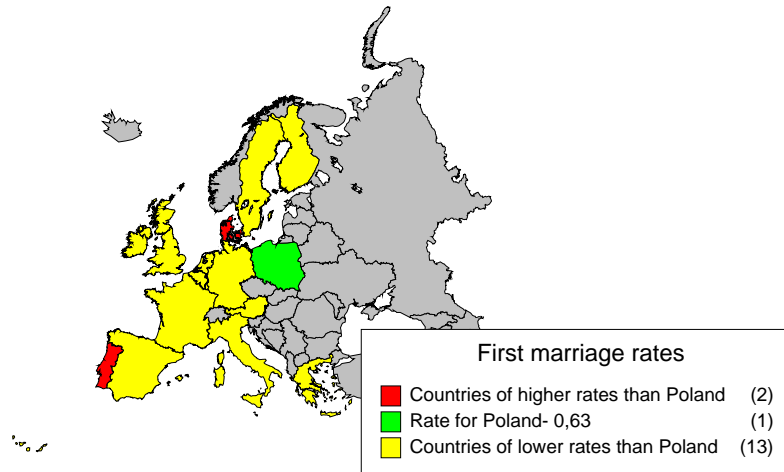
**Map 8. Share of illegitimate births: Poland- Candidate Countries**





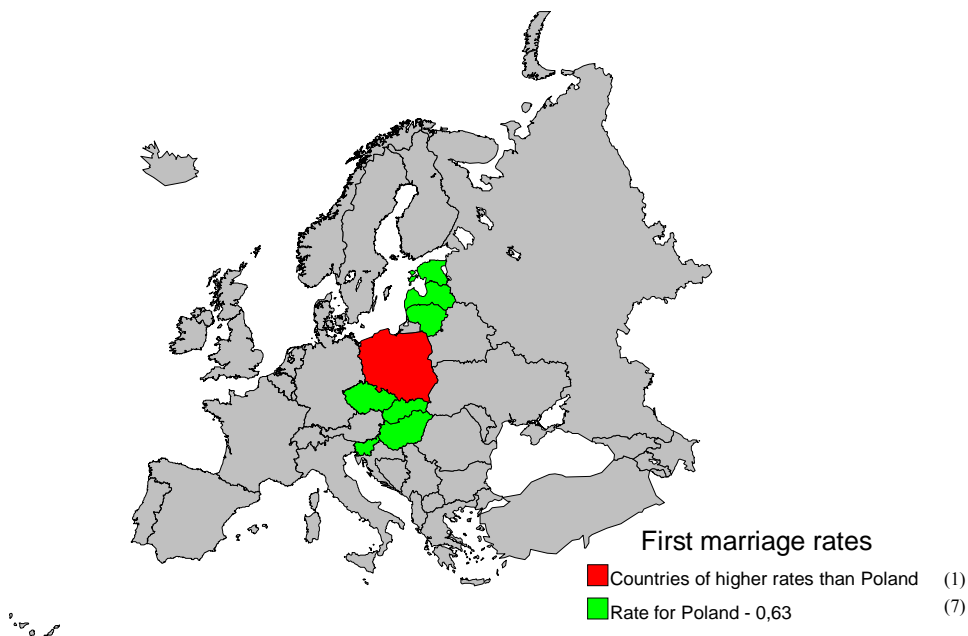
Source: Own compilation based on: *Recent Demographic Developments in Europe*, Council of Europe Publishing, Strasbourg 2001.

### Map 9. Female first marriage rates: Poland – European Union



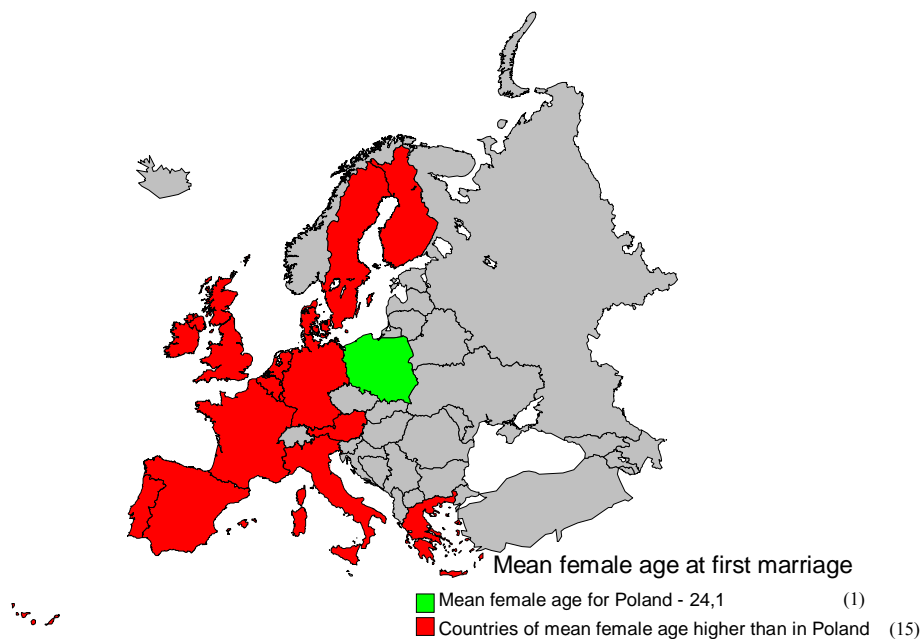
Source: Own compilation based on: *Recent Demographic Developments in Europe*, Council of Europe Publishing, Strasbourg 2001

### Map 10. Female first marriage rates: Poland – Candidate Countries



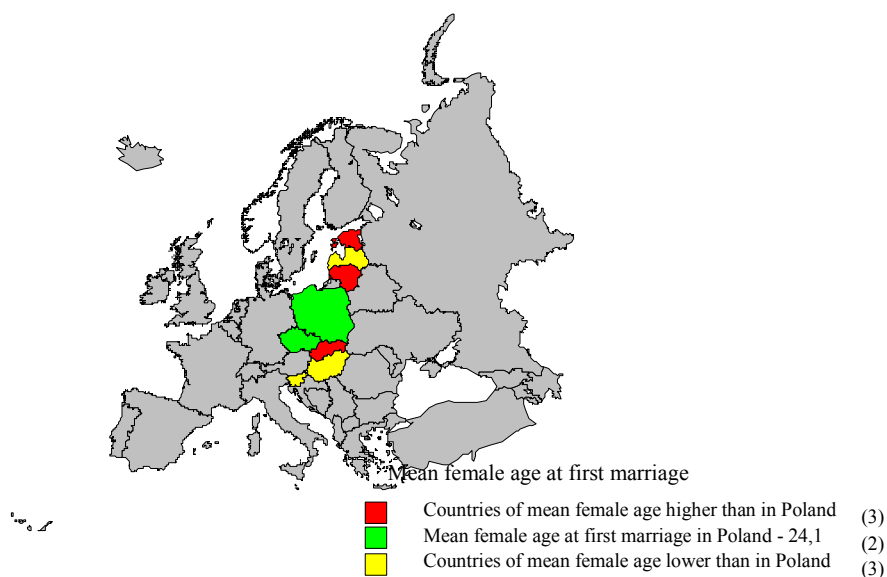
Source: Own compilation based on: *Recent Demographic Developments in Europe*, Council of Europe Publishing, Strasbourg 2001.

**Map 11. Mean female age at first marriage: Poland – European Union**



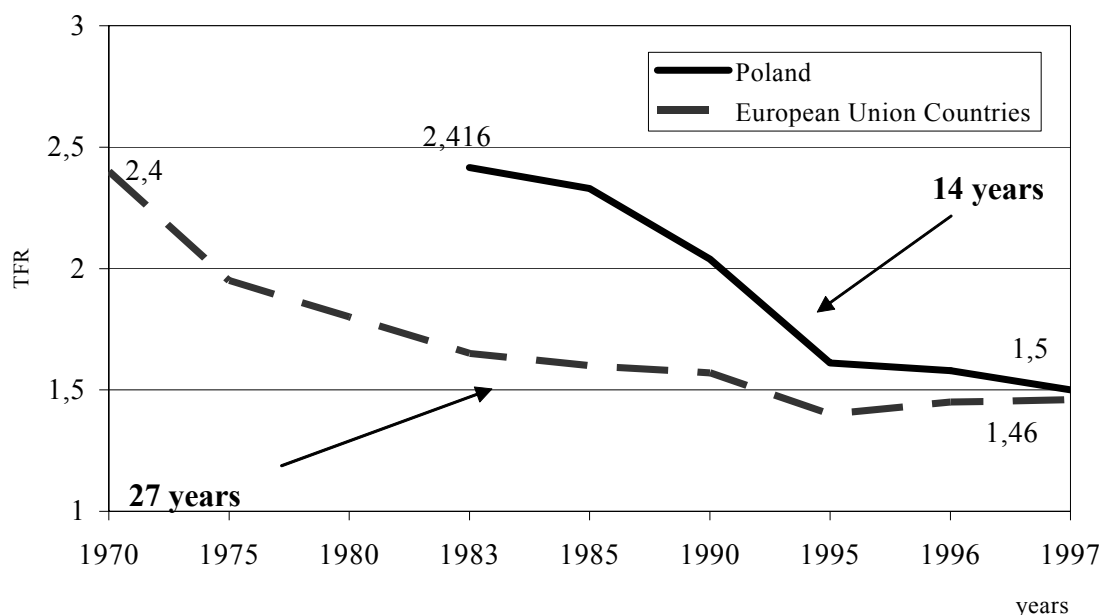
*Source: Own compilation based on: Recent Demographic Developments in Europe, Council of Europe Publishing, Strasbourg 2001.*

**Map 12 Average female age at first marriage: Poland – Candidate countries**



*Source: Own compilation based on: Recent Demographic Developments in Europe, Council of Europe Publishing, Strasbourg 2001.*

**Fig. 16 Total fertility rates: Poland- European Union Countries. Change over time.**



Source: Compilation based on CSO statistics, CE statistics (*Recent Demographic ...*, 2001).

5. Small number of consensual unions has been confirmed by the results of Polish retrospective survey 2001, which is representative for Poland's population aged 18-54. Distribution of the respondents by marital status was as follows: 28% - never married, 64% - married, 1.8% - widowed, 3.5% - divorced, 1% - cohabiting and 0.8% - in separation. Shares of the respondents in separation and cohabitation were relatively low. Simultaneously, results from the survey show that a decisive majority of the respondents (85%) approve of cohabitation (cp. Frątczak, Balicki 2003). A detailed analysis of the histories of first marriages and cohabitations from two Polish retrospective surveys 1991 and 2001 provide the arguments confirming changes in behaviors, mostly in younger cohorts, i.e. the ones which entered adulthood in the early transformation period, and their behaviors have been under the influence of the new Polish reality for a decade.

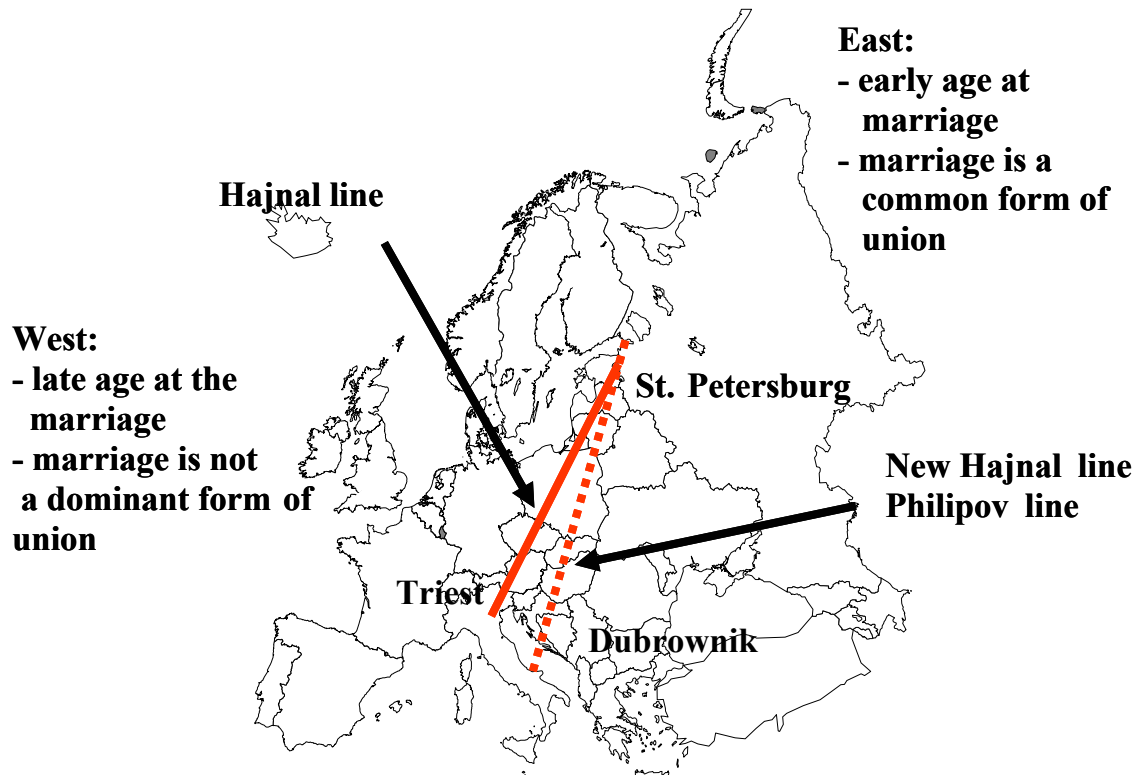
Changes in fertility, family, union and household formation and dissolution in the countries of Western, Northern and Southern Europe have been described in an abundant scientific literature, in which the processes and the factors behind them were presented together with theoretical reasoning (some sample works of this kind are, among others, Frejka, Calot, 2000; Hobcraft, 2002; Hoffmann-Nowotny, Fux, 2001; Klijzing Corijn (eds.); 2002; Lesthaeghe, Moors, 2000; Lesthaeghe, Moors 1996; Lesthaeghe Surkyn, 2001; Macura, Beets (eds.); 2002, Philipov Dorbritz 2002; Pinnelli, Hoffmann-Nowotny, Fux, 2001; United Nations, 1999, 2000, 2002). Changes which originated in the mid-sixties headed towards low, or very low

fertility levels, postponed family formation, increase in consensual unions, transformed forms of family reconstruction. They were stimulated by long range institutional, cultural and structural changes, advanced to a different degree in individual countries. This caused that the pace of transformation differed from country to country, accordingly to the concept of the second demographic transition (cp. Inglehart R., 1998, 1997, 1977; Inglehart R. et al., 2000; Lesthaeghe R., 1998, 1995, 1991, 1983; Lesthaeghe R., K. Neels, 2002; Lesthaeghe, Surkyn, 1988, 2000; Reher, 1998; Van de Kaa D., 2001, 1994, 1997). It should be remembered, that this is experience and effect of work of 30 years. Descriptions of the transition in countries under transformation (CEE countries) are scarce. Changes occurring in these countries are characteristic of rapid shifts in fertility and the changes in family, which are not so dynamic, but equally important. These changes co-occurred with many factors and processes, economic, political, social, administrative, ideological and cultural, over a relatively short period of time creating and shaping the mechanism of changes. Descriptions which offer evaluation of the phenomena include publications of Frątczak 2001; Philipov 2002, 2001; Philipov, Dorbritž, 2002; Philipov, Shkolnikov, 2001; Slany 2002; Sobotka 2003; United Nations, 1999, 2000. At present, neither the relevant data, nor the results from new-generation surveys are available, which might allow answering the question of the significance and role of the above-mentioned processes in transitions in a family and fertility for the groups of countries, or individual countries. Certainly, the changes should not be interpreted exclusively in the terms of the second demographic transition, using the mechanism of changes, as observed in western countries, to interpret what is happening in countries under transformation, Poland among them. Poland, like the other countries experiencing transformation, necessitates a many-sided and comprehensive evaluation of changes in fertility and family, as well as surveys of new quality, which might provide the background for such evaluation.

The analysis will be concluded with graphic interpretation of the presented material. Curves in Map 13 do not demarcate political divisions, but cultural ones; they run between the countries of traditional and modern patterns of family formation. These lines discriminate two different types of demographic behaviours – traditional and the modern ones. Map 13 displays the Hainal's line, defined and published by the author in the 1960s (Hajnal, 1965). Hajnal's line, linking St Peterborough and Trieste, runs across Poland. Philipov presented a new version of Hajnal's line, called Philipov's line at an international conference in 2001, devoted to low fertility. The updated line, connecting St Peterborough with Dubrovnik (the line was moved to the east, compared with the prior version) left almost the whole territory of Poland in the sphere of the West European pattern of family formation). This is important information, confirming the occurrence of changes in family forming trends in transformation period, which was accompanied by cultural

innovations (inclusive of changes related to the system of norms, attitudes and behaviors).

**Map 13. Hajnal's line**



Source: D. Philipov *Low fertility in Central and Eastern Europe: Culture or economy?* Paper presented at the IUSSP Seminar on "International Perspectives on Low Fertility: trends, theories and policies", Tokyo, March 21-23, 2001.

**7. What are the main problems concerning the family and fertility, which can and should be topics for further discussion?**

The range of questions presented below does not exhaust all the possible and potential problems in this field; however, it concentrates on the issues we presume to be the most important. The following questions can be still regarded as live issues:

- Can we talk about a 'crisis' of fertility and family in Poland?
- If so, how should it be defined and who is responsible for it?
- Has the process of fertility and family transition been completed yet, or should we expect the observed changes to continue?
- What are the dangers that threaten a present-day Polish family and what hazards does it face?
- What type of family policy, and broadly speaking population policy, should be put into operation in Poland in the face of the observed and the anticipated changes in fertility and family?

- Can, and to what extent, the experience of other countries be helpful in formulating and administration of the model of family-oriented policy?
- What attributes should have the model of family-oriented policy to be realized in Poland?

## 8. Conclusions

Changes in fertility level and the ensuing transitions of family and household forms are not only the trends which occur in Poland and the CEE countries with unprecedented intensity, they are experienced Europe-wide, or we may even say that world-wide. Over a short period of time, the number of countries in which fertility level does not ensure generation-to-generation replacement has grown. In particular, the last decade of the 20th century brought about, quite unexpectedly, a decline in fertility to an extent which compelled the **UN Bureau** to verify the assumptions adopted for global population projections in two subsequent years, 2001 and 2002 (cp.: *World Population Prospects. The 2002 Revision*, ESA/P/WP.180, UN, 2003). Effectiveness of family policy, or more broadly population, or social policies is questioned more and more often, seeing the low and very low fertilities. Considering the dilemmas of population policy, as related to the situation in Europe, P.Demeny asks the question: ‘What may be the reaction of Europeans to those enormous changes?’ The answer is rather critical.

*„One the possible variant is the politics of closed eyes and ears. That which is ignored causes no headache. It would be difficult to claim that European attitudes toward demographic matters are exempt from this comfortable stance. It would be easy to demonstrate that during the last quarter-century the European press, the continent’s informed opinion, and its proverbial man in the street were agitated far more deeply by the perceived problems of the ozone hole, the state of Amazonian rain forest, or the menace of global warming than engaged with problems, real or supposed, inherent in ongoing demographic processes, whether at home or in the neighbourhood. A reasonable explanation of this disproportion may be simple: the former problems, large as they may be, are potentially solvable – either through adjustment or by prevention. And the technological means for solution, at least in principle, can be made accessible, economically feasible, and politically acceptable in a modern, affluent, and democratic society. In comparison, deliberately modifying the factors, especially fertility and international migration, that underlie demographic change – either within or outside the relevant national borders – appears to be far more difficult.*

*Indeed, given existing value systems and conflicting group interests, the political system may even decide that solutions are impossible. In the latter case, the issue is rightfully kept off the political agenda. That which has no solution can be held to be not a problem ” (Demeny, 2003, p. 13,14). The author offers a conclusion that demographic exclusion of Europe will deepen in the present century.*

Daly (1997), in his article on the essence of reforms in European welfare states compares changes in financial transfers in the EU countries and Norway over a decade. Beside changes to procedures and principles governing the benefits, the analysis also investigated to what extent the patterns were emulated in welfare states. The policy was mainly aimed at: pensions, unemployment benefits, childcare leaves and childcare benefits. In the author’s opinion, the notions of convergence or divergence of working policies do not fully describe the reality. The article is a good review of reforms and assessment of the effects they produced in the 16 welfare states over the last decade.

Attempts to improve the performance of family, or family-oriented policies should take into account experience and evaluations from the past. Rarely have the publications in the scope of family, or population policies offered evaluation of their effectiveness, or drawn conclusions on this base.

The following publications offer evaluation of the policies’ effectiveness: Gauthier (1999, 2002) and a group of authors: Ekert-Jaffe, Joshi, Lynch, Mougin, Rendall (2002). The authors of the last-mentioned work presented a comparative analysis of the effects of family-oriented policies in two countries using different models of policy: France and Great Britain. The difference lies in the fact that France belongs to the group of countries with the so-called ‘conservative policy’, which is characteristic of a long-lasting tradition of state interference. Great Britain is a country of liberal policies (economy), where the assistance offered to families is not very wide. The criterion of analysis is the social position, which is related to both, family and occupation. Empirical analyses based on the data from about a forty-year period show significant differences in the performance of the two models and their effects on fertility and total fertility.

The fertility and family changes in Europe and policy responses were included as an important subject to the discussion during the time of the European Population Forum 2004 “ Population Changes and Policy Responses” , which was held 12 –14 January 2004 in Geneva, Switzerland <sup>12</sup>. In the thematic session

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<sup>12</sup> The UNECE convened The European Population Forum 2004 during 12-14 January 2004. The Forum reviewed recent salient population developments in the UNECE region, examined their causes, reviewed policy responses and drew lessons from them. It has considered important, newly emerging population changes , examined challenges they pose and identified best policy responses to them . In this context Forum has examined the implementation of the ICPD – related regional and global agreements of the 1990s in the

“ Childbearing and Parenting in Low Fertility Countries. Enabling Choices” headed by Mr Steven Sinding (Director General IPPF) five panellists presentations and two backgrounds papers ( by F.Billari and A.Gauthier) have concentrated on the following aspects: to explore how and why in most of the UNECE countries such low level of fertility arise (fertility is at sub-replacement levels)?; understanding the ways in which individual choices and lifestyle preferences, gender structures, value systems, time constraints, economic and housing circumstances, changes in the welfare state, and judgments concerning the medium – to long-term security of the partnership and childrearing environment interplay. The special concerns regarding the choices, opportunities and constraints facing young people including, *inter alia*, employment, security, living arrangements, partnership and parenthood also have covered.

We should be conscious that any model of policy administered and operated in a low-fertility society should take into account the concrete social and economic situation of the country, its financial capacity, demographic, cultural backgrounds, and clearly specified goals to be achieved. Family-oriented policy conducted in a situation when fertility is low should be a constituent of a well-constructed structure, i.e. population and social policies. Social approval rooted in social and political realities is undoubtedly of some importance here. Concluding this short characteristics, it should be stressed that Poland can and should refer to the experience of western countries. However, transmitting ready-made patterns to our background is impossible. Adjustment or modification of the model solutions should take into account Polish realities, conditions and capacities.

Following conclusions can be formulated with regard to transformation of family and fertility in Poland against the background of Europe:

1. Changes in fertility and total fertility, which have been occurring in Poland in transformation period are far-reaching and give raise to anxiety. Total fertility at the level of 1.29 (below 1.3 children per woman) gives Poland a position among countries of very low fertility.
2. The process of fertility and family transition has not been completed yet and it should be expected to continue in the future.
3. Broadly understood cultural processes, the new dimension of social and economic trends activate changes in norms, values, attitudes and behaviours, which start playing a significant role in marriage and procreative decisions.
4. Assessment of the radical changes in fertility and the family model necessitate permanent monitoring of the trends, and a new quality of

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UNECE region, particularly in countries in transition and, as appropriate, globally. For more information about European Population Forum see: [www.unece.org/ead/pau/epf](http://www.unece.org/ead/pau/epf)



demographic research, including perpetual interdisciplinary studies on norms, values, attitudes and behaviours.

5. New quality of research denotes, among others, initiating a permanent demographic research of interdisciplinary character in our country and Poland's participation in the new European panel survey: *Gender and Generation Programme*<sup>13</sup>.
6. It is necessary to prepare a wide-range study (or, even more broadly, a forum) on transition of family and fertility in Poland, as compared with other countries, countries of the European Union and the EU candidate countries among them. This should be done in order to indicate similarities and differences in demographic processes and the changes to be expected in the future, in the context of the well-known and useful theories related to the concept of the second demographic transition. Results from Polish retrospective studies 1991, 2001, National Census 2002 and *World and European Value Surveys*, which were carried out in Poland and other countries should serve as a database for such study.
7. Seeing the observed and the anticipated changes in fertility and family in Poland, family-oriented policy seems to be the proper model to be adopted in our country. Constructors of the model should refer to the experience of other countries, western countries among them, as the process of transition started much earlier there and their experience in enforcing definite policies has brought, at least to some degree, the expected effects.
8. Family-oriented policy model is a policy encouraging fertility – policy for fertility – based on recognition and understanding of the nature of low and very low fertilities.
9. Pillars of family-oriented policy are, among others, (cp. McDonald, 2002):
  - Financial incentives,
  - Public support for parents' combining employment and the family life;
  - Wide social changes in support of children and parenthood.

The three above-mentioned pillars correspond to the four theories of low fertility – the theory of rational choice, the theory of gender equity, the theory of risk aversion and the post-materialist theory of values.

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<sup>13</sup> More information can be found on the website: Population Activities Unit Economic Commission for Europe, UN, Geneva: [www.unece.org/ead/pau/ggp/](http://www.unece.org/ead/pau/ggp/).

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