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Low Fertility and Social Policy: Comparing Poland and Russia

First draft

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1. Introduction

Until the revolutionary period of political and social transformation that began in 1989, the countries of Central and Eastern Europe were characterized by relatively stable demographic developments. The dramatic changes in basic demographic processes occurring since the fall of communist regimes were thus unexpected in their range, direction and pace. This paper examines what is and is not known about these significant demographic shifts in fertility and family formation, and offers an innovative, multidisciplinary perspective to explore the relationship between public policy and family as a means of adding to existing knowledge.

According to Philipov (2003, p. 11 - 13), the key changes in social and demographic processes can be characterized as follows:

- 1. Nuptiality and fertility dropped to unprecedented low levels: extra-marital cohabitation and the share of extra-marital birth increased tremendously; rapid postponement of these events took place; migration increased significantly. All these new demographic trends were observed in all countries although at the different pace. Mortality was more divergent: it increased in some countries and remained about constant or decreased in others.
- 2. The complex and sudden political and economic transformation had significant social consequences. The rise of unemployment and impoverishment resulted in extreme forms of social stratification in a short time frame. Societies became polarized into winners and losers of the transition, and the social exclusion of impoverished and unemployed people rose as a significant feature of social life. The fall in income was accompanied by the widening wage gap.

In summary, the overall political, economic and social transformations have been sudden, deep and irreversible. It is hardly surprising that they have led to significant demographic changes.

Yet numerous questions remain about the precise mechanisms causing these changes at both micro and macro levels. Answering these questions requires an innovative and multidisciplinary inquiry into the relationship between social, economic and political processes and the demographic processes. The relevance of such an inquiry is not limited to the countries emerging from the socialist system, but has the potential to help clarify the underlying social foundations of demographic processes throughout Europe.

For example, reactions to social and economic transformations are related to the appearance of a combination of factors that individuals face: more uncertainties in individual life, more responsibility for individual careers, and more opportunities for individual decisions, etc. As a consequence, the transformation away from socialism has brought about significant shifts in individuals' behaviour, which become reflected in the dramatic shifts in demographic processes noted in this region. (Kotowska, Jóźwiak, 2003). However, it is arguable that residents of Western Europe and the US face similar situations regarding uncertainty and individual responsibility, and this analysis, therefore, has quite broad relevance globally.

In Eastern Europe, the most noticeable changes among demographic processes relate to fertility and families (specifically, in the forms of relationships, and their formation, dissolution, reconstruction, etc.). As already mentioned, marriages and births decreased and were postponed, while the share of non-marital unions and extra - marital births increased. Some demographic changes, such as the abrupt fall in fertility, are <u>unprecedented</u> in the history of humankind in peace time. The TFR decreased to 1 and the total first marriage rate

(TFMR) went down below 0.5 in some countries from the region. Analogous drifts were observed in all countries in the region.

This paper poses the question of whether existing theories are adequate for explaining the mechanisms of fertility and family transformations in this specific demographic laboratory of Central and Eastern Europe. If well-known theories need to be newly interpreted, to what extent should this be done? On what grounds should new theories and works be formed, if there are any?

This paper argues that the population policy, including social policy, family policy, demographic politics, and their debates, is a critical issue to be examined for understanding demographic change and low and very low fertility. These subjects have been raised in the works of A.H.Gauthier (2004), Neyer (2003), Silll (2003) and others. We argue that population politics and social policy must be part of new theoretical formulations regarding fertility and family change. Drawing on multidisciplinary approaches and theoretical perspectives, we offer the following reasons why policy analysis is beneficial to this endeavour:

- 1) While unions and fertility behaviour are ultimately undertaken by individuals and couples, they do not act in a vacuum. People make decisions about family life on the basis of changing cultural norms, values, and pressures, and economic opportunities and constraints. In explaining demographic processes, it is necessary to detail the particular socio-cultural and economic environments in which decisions are made and behaviour is carried out in order to fully understand such processes. For example, the social environment influences subjective perceptions of the utility of having children and it also has an effect on an individual's or a couple's pool of resources that can be used to rear and educate a child (Buehler, Fratczak, 2004, p.22).
- 2) The impact of public policies on family processes is far from fully understood. While there is clear evidence that coercive legislation such as the criminalization of abortion does not result in sustained, higher fertility rates (Kligman 1998), much work remains to be done to understand the influence of social welfare policies on cultural ideals and reproductive decisions.

Some authors have explained the postponement of first union/marriage formation and the postponement of at least first births in Russia as the rational choices and new individual behaviours emerging in response to economic, social and cultural reforms (Zakharov and Ivanova 1996). We suggest that substantiating this hypothesis can be undertaken through discussions of policy and the effects of policies on women and men in Russia and Poland. We contend that it is both necessary to understand the factors that are responsible for low fertility as well as the factors that support fertility, i.e. that reduce the costs of having children and that raise the subjective utility of children in modern societies. Consequently, we consider this paper as a preliminary effort to address the following questions

- 1. What were the direct and indirect responses of social policies in Poland and Russia to the intensive transformations of fertility rates and family formation?
- 2. How might a multidisciplinary perspective that draws on demography, sociology and cultural anthropology help elucidate the development of policy regarding fertility and family, and the effects of these policies, in the cases of Poland and Russia?

In the following discussion, we focus primarily on the links between social policy as an economic instrument, and social debates on economics and ideological change. We want to note that an important issue to examine in future renditions of this project but cannot elaborate on here is the question of abortion and contraceptive policies.

2. Fertility and Family Changes – Demographic Evidence

Poland and Russia similarly to other Central and Eastern Europe countries have been experiencing socio-economic transformation since 1989. This process has been accompanied by changes in basic demographic processes, such as fertility, mortality, and migration. The observed changes also affect formation and dissolution of relationships, families and households. The scope, range and pace of these alterations are much more intensive than those observed in the countries of the Western Europe since the mid-sixties. Also, the mechanism of changes and the processes underlying the intensive demographic transformations are more complex than the ones commonly known as the second demographic transformation. (Cp. Van de Kaa, 1987, 1994). The changes observed in basic demographic processes result in a considerable slowdown of the demographic development of Poland and Russia in the recent period as compared with the more distant past. Thus, in the nineties the mean rate of changes in the Polish population decreased to reach the level of 0.12%. Hence, the pace of changes was thirteen times lower than that in the 1960s (when the rate stood at the level of 1.56%). The sources of the significant decline in the rate of Poland's population increase in the 1990s included a substantial decrease in births, changes in directions and sizes of internal and international migration, as well as shifts in mortality. Changes in fertility, family formation and marriage will be discussed in general.

In the years 1990-2002 Russian population has decreased from level of 147.7 million to 143.1 million, Poland's population was almost stable and has changed from 38 million to 38.2 million.

In Poland in he years 1990-2002, the number of live births declined from the level of 564.4 thousand to 353.8 thousand (by 37.47%). Birth intensity per 1,000 persons dropped from 14.9 to 9.3. For Russia in years 1990-2002, the number of live birth declined from the level of 1988,9 thousands to 1396.9 thousands (by 29.8 %). Birth intensity (crude birth rate) dropped from the level 13,5 to 9,7 (compare Figure 1a). Both countries experienced decreasing tendency in births intensity since the mid eighties.

Total fertility rate (TFR) is a synthetic fertility measure. For Poland in the years 1990-2002, its value systematically decreased from the level of 2.05 in 1990 to 1.24 in 2002, which is a decline by 39.6 %. TFR in the interval 2.10-2.15, at the current mortality is defined as the level sufficient to ensure simple generation replacement. This means that one woman at the childbearing age (15-49) has a little more than 2 children, on the average. It should be stressed that total fertility rate lower than 2.1 was reported in urban areas as early as 1963. Its increase to 2.14 in the late seventies and the early eighties was followed by an enduring decline after 1983. TFR under 2.1 occurred in the rural areas in 1995, which followed a systematic decrease since 1983. This leads to a conclusion that fertility patterns observed in urban areas occur in rural areas some time later. Changes in the TFR value are the result of shifts in particle distributions of fertility rates by age.

It can be stated that Poland has witnessed marked changes in the patterns of fertility, which consist in lower birth intensity in all age groups, different dynamics of fertility in individual age groups, similar fertility rates in age groups of the highest fertility, i.e. 20-24 and 25-29 and increase in share of groups 25-29 and 30-35 in total fertility rate. Age group 25-29 was characteristic of the highest fertility. Changes had the same directions in urban and rural areas, although the fertility curves are not only flattened in different ways, but also the ages of maximum fertility are different. Assessment of these changes allows drawing a conclusion that rural and urban fertility patterns are becoming similar (the differences are narrowing). For Russia in the years 1990-2002, the TFR value dropped from the level of 1.90 to 1.32. Both countries present very low level of fertility with TFR at the level of 1.3 and less.

The changes of fertility patterns are connected with the changes of the mean age at the childbearing (compare Figure 1b). A systematic decline in this parameter was observed in Poland during the entire period beginning with the year 1990, as its value decreased from the level of 26.2 years in 1990 to 27.8 years in 2002. A decline in this parameter from the level of 25.2 years in 1990 to 24.8 years in 1995 was observed in Russia in the first half of the 90s. A growth in the parameter to the level of 26.1 years in 2002 took place since 1996. Therefore, differencec between Poland and Russia may be pointed out, particularly in the first half of the nineties. The more detailed results of the studies are based on the appliance of the Bongaarts-Feeney formula to the data for Poland and Russia (Bongaarts, Feeney, 1998), they are among alia included in the works of: Billari, Kohler (2004), Fratczak, Balicki (2003), Philipov (2001)), that allow a distinction between tempo and quantum effects related to TFR. Comparing Poland and Russia, taking into consideration the results of Bongaarts-Fenney formulae applications, can be concluded that: for Poland both in the first and second part of the 90s the tempo effect was considerable. For Russia in the first half of the 90s tempo effect was negative, i.e. the adjusted TFR was lower than the observed one, but in the second part of the 90s the situation was reverse. It should be expected that changes in the birth calendar would still affect the decrease in total fertility level in Poland.

Most births in Poland are the legitimate; however, they are losing their share to the advantage of illegitimate births. Illegitimate births amounted to 14.4% of all live births (17.4% in urban and 10.7% in rural areas) in 2002. About thirty-five per cent of all illegitimate births were those of women under 19. Three-thirds of all illegitimate births occurred in urban, one-third – in rural areas. Extra-marital births in Poland were stabilised for a long period (in the years 1960-1990). They stayed on the level of about 5-6% of the total number of birth. The situation in Russia was different. Until the nineties, the level of extremarital births was over twice higher than in Poland. For example, in Poland in 1970 it was on the level of 5%, while in Russia – on the level of 10.6%. Also in the years 1990-2002, the share of illegitimate births was over twice as high in Russia than in Poland (see Figure 1d). In 2002 extra-marital births in Russia comprised almost 30%, while in Poland the respective share amounted to about 14 %. Another characteristics are indicators of the process of formulating and disintegration of marriages (presented in a graphic form in the 2a - 2d). Over the whole period of transformation, crude marriage rate and total first marriage rate were higher for Russia then for Poland. But very important difference concerning the mean age of women at first marriage and divorce rate (compare the figures 2c and 2d). Women in Russia contract marriages at the younger age than in Poland. For example in 1995, the average age of women in Russia was on the level of 22 years, while in Poland it was one year higher (23 years). Divorce is much more often reason for marriage termination in Russia than in Poland. Poland belongs to a group of European countries characterised with the lowest level of divorces. The crude divorce rate for 2002 was at the level of 1.2 for Poland and 6.0 for Russia per 1000 population. It means that intensity of marriage disruption due to divorce is five times higher in Russia then in Poland. Poland is among the countries where the most common form of family is the one based on marriage. Cohabitation is very rare form of relationship. The last National Census 2002, indicated that in Poland families based on informal relationships comprised less than 2% of the total number of families. Notwithstanding its constant transformations, i.e. as regards the number of children, the model of family in Poland it is still traditional. A significant number of marriages, i.e. about 80%, is terminated due to a death of one spouse, while the remaining 20 % comprise divorces and separations.

rure 1a.

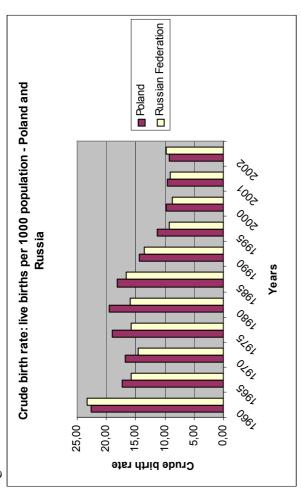


Figure 1c.

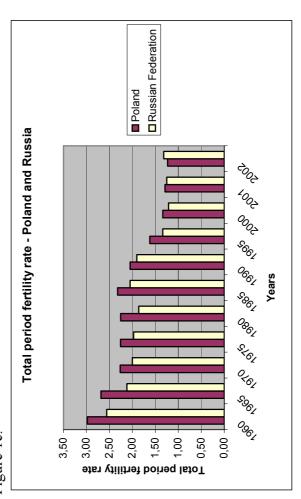
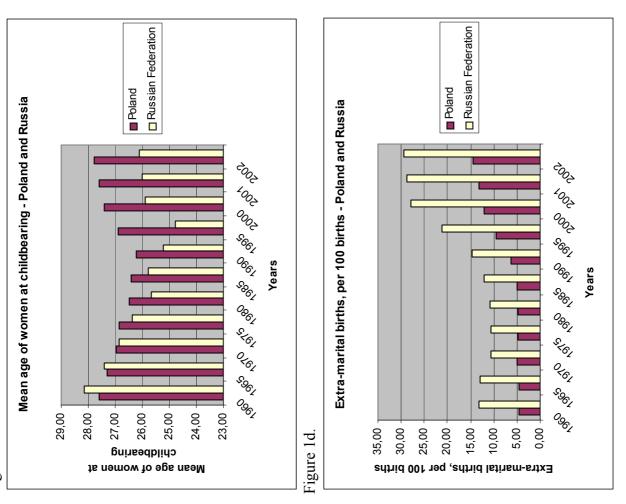


Figure 1b.



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Figure 2a.

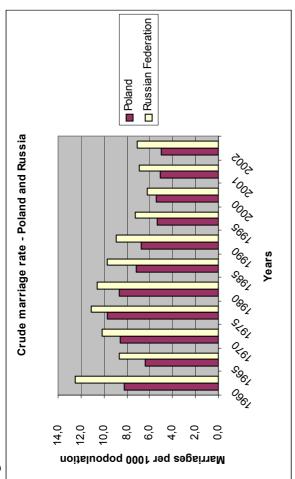


Figure 2c.

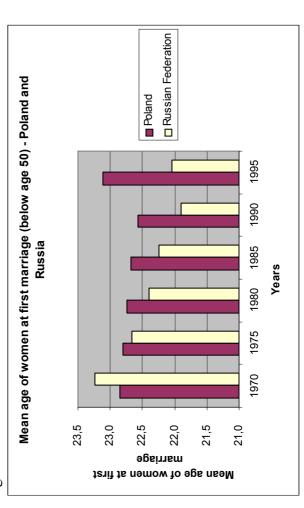


Figure 2b.

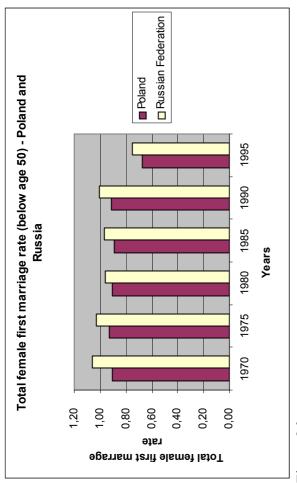
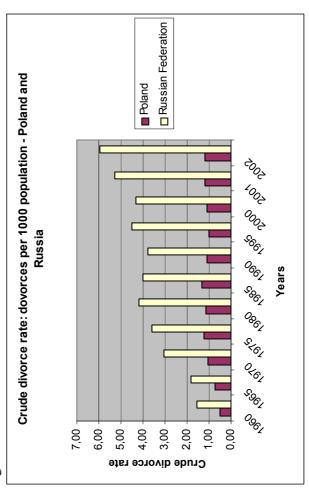


Figure 2d.



Disinclination to contract first marriages is a very important attribute of demographic changes in Poland in the transformation period. It is one of the causes of changes in fertility and the decline in the number of births, because in Poland fertility is closely related to nuptiality. In Poland, a decline in the number of marriage contracts was been observed over the whole post-war period, form the level of 255.7 thousand in 1989 to 191.5 in 2001. The intensity of first marriages is falling, which is expressed through changes in first marriage rate, which went down from 0.853 in 1989 to 0.572 in 2001 in the male population. Over the same period, the rate for women fell from 0.904 to 0.571 (cp. data in Table 1).

Changes in the rates for both, male and female populations show a permanent downward trend in the intensity of first marriages and are accompanied by postponing the decision of family formation. This leads to increase in the average age at first marriage. Application of the Bongaarts-Feeney's Model is an attempt to explicate and describe the changes in the first marriage rates. Comparison of the values of the observed and hypothetical (adjusted) rates allows measuring the 'tempo effect'. Respective results are included in Table 1, and Figures 3 and 4. Changes between the values of the observed and adjusted rates for years 1989-2001 are slightly higher for female than male populations, which may mean that women are more deeply involved in the changes in first marriage pattern. Over the examined period, average age at first marriage grew for both, male and female populations by 1.4 years, but it was slightly higher for women than men in the last years of the period under study (cp. Table 2, Figures 3 and 4).

The difference between the adjusted and the observed first marriage rates widen considerably in the last years of the period. Beginning with years 1999 for men and 1988 for women, the differences grow quickly to rich the level of 50% in 2000. This proves that the transformation process of first marriage pattern has not been completed yet and further changes should be expected. The observed changes lead to shifts in marital status of Poland's population.

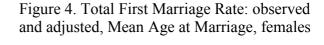
Table 1. Total first marriage rates, observed and adjusted, mean age at marriage, males and females, 1989-2001.

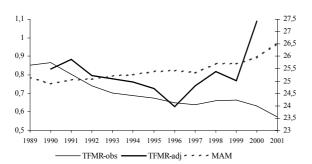
Years	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001
First marriages - males													
TFMR-obs	0.853	0.868	0.805	0.742	0.704	0.69	0.673	0.649	0.638	0.661	0.665	0.631	0.572
MAM	25.14	24.89	25.05	25.07	25.19	25.26	25.38	25.41	25.32	25.69	25.7	25.96	26.54
TFMR-adj		0.831	0.885	0.798	0.778	0.762	0.727	0.630	0.742	0.816	0.769	1.088	
First marriages - females													
TFMR-obs	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
MAM	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
TFMR-adj		0.854	0.822	0.774	0.766	0.766	0.729	0.728	0.760	0.736	0.944	0.990	

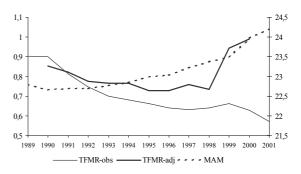
TFMR-obs (Total First Marriage Rate - observed), TFMR-adj (Total First Marriage Rate - adjusted), MAM (Mean Age at Marriage).

Source: Own calculations based on the CSO data, E.Fratczak, A.Ptak-Chmielewska

Figure 3. Total First Marriage Rate: observed and adjusted, Mean Age at Marriage, males







Source: Own calculations based on data of the Central Statistical Office, Warsaw, E.Frątczak, A.Ptak-Chmielewska

Source: Own calculations based on data of the Central Statistical Office, Warsaw, E.Fratczak, A.Ptak-Chmielewska

Poland's fertility and nuptiality processes are different from those in the countries of Western Europe or in the other candidate countries with regard to a still high share of legitimate births and low level of cohabitation. Moreover, a traditional model of family is based on the history of first relations, in which death of one spouse is the main cause of marriage dissolution (about 80%) and a relatively low (compared with other countries) level of divorces.

The legal regulation that might have affected births in Poland was the law of 1993. It banned abortion. Experience up till now shows that it has not curbed the downward trend in births. There is general opinion, that the legal prohibition on abortion has not brought about any significant changes in fertility.

Changes in fertility, reproductive and nuptiality patterns lead to fundamental changes in the model of Polish and Russian family. The observed changes indicate that Poland is adopting a model of reproductive behaviour under which the decisions concerning both: marriage and having children are postponed. In Russia, the changes in family and fertility are a little bit different as compared to Poland. The relationships between marriage and fertility in Poland are stronger then in Russia. Moreover, the changes in fertility and family in both countries during the transition periods indicate that Poland has moved much closer to the west model then east union formation according to Hajnal's line(Hajnal, 1965, line was modified by Philipov in 2001 (Philipov, 2001) division¹. Comparison of the selected indicators (see figures: 2a-2d) allows a preliminary conclusion that both processes: family formation and dissolving are slightly different in Russia and in Poland, even though both countries experience intensive transformations. Detailed verification of the above statement necessitates thorough studies in the area of demographic attitudes and behaviours of young and middle-aged populations.

¹ Traditional (East) and modern (West) patterns of family formation. West - is characterized by: late age at marriage , marriage is not dominant form of union. East – is characterized by early age at marriage and marriage is a common form of union.

3. Theoretical Considerations

One indication that socio-economic policies and family policies have an effect on fertility comes from the experience of Scandinavian countries, which are not experiencing the lowest of low fertility that is plaguing other states where inequality and poverty are more widespread. According to Neyer (2003), "Countries which regard their family policies as part of labor- market policies, of care policies, and of gender policies, seem to have retained fertility above lowest-low levels. They use strategies directed at changing the labor market so that both women and men are able to maintain their employment and income, even if they have (small) children to care for" (Neyer 2003, p 62).

Studies of low fertility have focused on identifying the major areas of policy activity in an environment of low fertility. McDonald highlights financial incentives, initiatives related to employment and family, and wide social change encouraging having children and parenthood. Activities and actions to be taken under these three pillars, according to the author, include (McDonald, 2000c p. 15 and following; 2002 p. 435-442):

Financial incentives

- a. Temporary cash payments
- b. Lump sums or loans
- c. Tax abatement, credits and deductions;
- d. Charge-free of subsidized services and goods
- e. Housing subsidies

Initiatives related to work and family

- a. Maternity or paternity leaves
- b. Childcare
- c. Flextime and short special leaves for domestic affairs
- d. Anti-discrimination legislation and gender equity in employment practice
- e. Convenient working hours.

Broad social changes supporting having children and parenthood

- a. Initiatives related to employment
- b. Child-friendly environment
- c. Gender equity
- d. Supporting marriages and consensual unions
- e. Development of child and parenthood-friendly social attitudes.

Another set of papers addressing the relationship between population and policy in the context of the low fertility evolved from the European Population Forum 2004 (A.Gauthier., 2004; A. Gauthier ,K.Kieran, J.Hobcraft, 2004). Examining the kinds of "enabling choices" that may exist in a particular environment, they point out the following four kinds of policy responses:

- 1. Financial and legal support to families
- 2. Support to employed parents
- 3.Gender equality
- 4. Child and family-friendly societies

The above mentioned publications mainly discuss the problem of western countries and they offer very few assessments of policies in the CEE countries, where changes in fertility have been deep and rapid, and the socio-cultural and political-economic contexts differ substantially from western societies. As the work of Peter McDonald and other experts in this field has shown, the study of the effects of policy on low fertility requires new approaches and elaborations.

Our approach aims to integrate demographic analysis with sociological and cultural anthropological insights into policy and statecraft, family life, gender, and life course. We also take into account the particular, historically unique experiences of social change occuring in this region since the 1989. We begin by acknowledging that the impact of social policy on individual values and behaviors and family relationships is a difficult issue to assess. On the one hand, we can say that there is no direct, mechanistic relationship between state policies and micro-level behaviors. Even if we take the case of the most repressive, coercive kinds of policies, such as the criminalization of abortion in Ceaucescu's Romania, the regime was unable to prevent a sizable number of women from circumventing state laws; nor did women accept the state's ideological claims that childbearing was a national duty (Kligman 1998). On the other hand, we can certainly find ways in which social policies indirectly affect union formations and reproductive behaviors by structuring the range of possibilities that people's life courses may take. For example, socialist policies of women's universal, full time paid employment, coupled with state sponsored day care services and housing shortages, made early unions and early childbearing highly likely. Under this socio- economic arrangement, there was no "need" or benefit for women to postpone marriage and childbearing, inasmuch as jobs would always be available (nor was there much competition for acquiring them), childcare services were readily available, while obtaining better housing would be a extremely long-term and indefinite proposition. Together with fairly widespread cultural taboos on cohabitation, these policies contributed to a high likelihood that women in Russia and Poland would have children at a rather young age in comparison with their counterparts in market societies to the West. At the same time, these same factors of housing shortages, and full-time employment, combined with the lack of household amenities and cultural norms that made women responsible for the vast majority of domestic labor, meant that most women in these societies would have few children. The Soviet Union's three year maternity leave established in the 1980s furthered this perception that having children young was beneficial, and also lent credence to the widespread cultural views of women as primarily responsible for children and the home, of men as primarily connected with work and the public sphere.

It is important to underscore that these policies thus did not "force" or even "persuade" people to undertake certain decisions and behaviors, but rather structured an environment in which certain material opportunities or constraints presented themselves to people, and particular kinds of social roles and cultural values came to appear logical and desirable: in other words, certain behaviors became equated with a "normal" life course.

And so, to understand how social policies impact fertility behaviors, we are faced with the challenge of discerning what necessarily must be seen as an <u>indirect</u> form of influence. Drawing from anthropological theories of culture and the state, we may say that social policies contribute to the creation of a broad cultural context of thought and action about citizens' behavior and citizen-state relations. Policies can be viewed as statements of values; but it is also true that policies are rarely the result of

unanimous opinions—they result from debate, disagreement, and the negotiation of values by recognized stakeholders. Policy thus reflects and in turn shapes the parameters of acceptable discourse, thinking and action in a given context. It is an artifact of historical debates and an articulation of changing and competing cultural worldviews. In addition to studying policy in this way, of course, it is important to gain empirical insights into the ways policy debates shape and limit the kinds of cultural knowledge and action of people from different social strata.

In developing this study, we propose that the following questions should be at the center of this developing inquiry into the relationship between social policy and fertility:

- 1. What does the notion "policy on low fertility" mean in different contexts?
- 2. What is the scope of action which policies assume? (Financial, educational, institutional, etc?) In other words, what kinds of influence over social life, consciousness, and behavior is policy assumed to have?
- 3. How does the focus and direction of policies related to family relate to the level of socio-economic development of country or region? How do policies reflect the political (or ideological) context of debate in a given country or region?
- 4. Which type of activities in the field of policy on low fertility (direct or indirect policies) have the greatest effect on people's behaviors/decisions? How do different policies affect various groups in a country (viewed from the perspective of social stratification) differently?

This paper presents a preliminary effort in our larger project to begin addressing these questions. In the following sections, we review the main lines of family policy development (mostly in Poland) and debates over fertility policy (mainly in Russia). We focus on the ways these debates and policies shaped cultural understandings of family life and the relationship between citizens and the state; we also describe the continual tensions between market reforms and family policies aiming to reverse low fertility.

4. Family Policy in Poland: from 1989 forward

Under the socialist era, women's full employment and an extensive safety net of state-sponsored health care, childcare, education, and low prices served as the backdrop against which family formations and family policies developed. One of the consistent ways the socialist state tried to support families and promote childbearing was through child allowance programs and maternity leave benefits, policies that in effect, aimed to ameliorate some of the inadequacies women faced in the existing welfare state system. The socio-economic changes initiated in 1989 necessitated adjusting the instruments of family-oriented policy to coincide with market reforms, which have not always been family-friendly. In her latest work, B. Balcerzak-Paradowska (2004, p.218-238)², analyses the transformation period with regard to Polish family policy and breaks it down into the following sub

² Rodzina i polityka rodzinna na przełomie wieków (Family and Family Policy at the Turn of the Centuries), IPiSS, Warszawa 2004

periods: the earliest transition era - between 1989-1994, the middle era, 1995-2003 and the era since 2003. What was specific to each of these time frames?

In the first era, family-oriented policy was based on a conviction that parents have the right to bring up and educate children which meant making the family responsible for its well-being. In practice, this meant the governmental withdrawal of assistance of various sorts (institutional, financial, etc) from the family, a new, unheard-of situation that forced families to pull themselves together or face new risks of incalculable proportions. Administrative and legal changes imposed decentralizing measures on family policy and social policy more broadly. Responsibilities in these fields were delegated to local (district) self-governments, a scope of action that was beyond their financial and organizational capacity. Local governments were not equipped with the means sufficient to carry out the newly-assigned tasks, which resulted in limited activity of education and cultural centers, like crèches, kindergartens, primary schools, cultural and sports centers, or – the costs of their functioning were offloaded onto children's parents. The family was compelled to participate in the costs of bringing up and educating children to a greater extent than before 1989. Over that period, welfare provided for families by companies was significantly restricted.

The principles of family-oriented policy in Poland in the early transformation period (years 1989-1994) were (cp. B.Balcerzak – Paradowska, 2004, p. 219 - 220) as follows:

'The subjectivity of the family,' interpreted as the family's responsibility for its own wellbeing; a multitude of subjects undergoing family-oriented policy and market prices on social services. But policy assumptions and actions did not take into account the situation of families living under difficult socio-economic conditions. The living standards of many families dropped, the poverty zone expanded, the gap between the lowest and the highest incomes widened, and large-scale unemployment was reported, accompanied by negative economic and social effects on families. Deteriorating living standards were not only a result of objective determinants, but also due to some subjective causes – the lack of opportunity or capacity to take advantage of the new socio-economic situation.'

Over the subsequent period (1995-2003), activities undertaken under family-oriented policy in Poland shifted to a means-tested form of social support based on the following principles (cp. B.Balcerzak-Paradowska, op. cit. p. 221):

- protection of the poorest families,
- selective granting of benefits.
- equal rights to social benefits for males and females,
- stricter control of demographic processes (pro-natalist elements)
- Formal programmes, adopted by subsequent governments, are worth mentioning while discussing this period. The first of them was the "Programme of Policy on Family" of 1997 (Democratic Left Alliance) and the second one 'Family-Oriented State Policy' of 1999 (Election Action Solidarity)³.

Changing governments after 2001 have brought about more alterations. Over this period, family-oriented policy has not been codified in a single document, as used to

³ Both programmes were associated with the ideologies presented by political parties, the former one of 1997 – leftist option; the latter of 1999 – rightist option.

occur under the socialist government. However, family-related issues have been included in some other officially implemented programmes, e.g.: *Strategy for Social Policy - Labour and Social Security 2002-2005*⁴. The strategy comprises actions in two areas: employment and social security. Social security includes, among the others, the following issues:

- social insurance and social provision,
- pension funds,
- welfare and family benefits,
- welfare benefits, employment, social and occupational rehabilitation of disabled persons,

Actions taken by the government led to the reform of the family benefits system in 2003 followed by a new law, The Family Benefits Act⁵. The regulations determine the conditions for acquiring the right to family benefits and set forth the principles of determining the amount, allotment and payment of benefits. The essence of the reform consisted of an attempt to construct a new system of family benefits, which was designed to support the family in fulfilling its parental, upbringing and educational functions. The core of the new system consisted in introducing a new, unified income criterion to determine the eligibility for the benefit, the so-called THRESHOLD OF INCOME SUPPORT FOR FAMILIES ⁶. Under the new law, family benefits include: family allowance and supplements, attendance allowances: a care giver's allowance and benefit. Enclosure 1 includes detailed information on allowances under the former and the new systems as related to the family situation. Like any system-level transformation, the present one has its advantages and disadvantages. The former group undoubtedly includes the introduction of a new, objective income criterion and its verification every three years, extended support for families with a disabled child and coverage for persons who had hitherto used welfare benefits. The disadvantages include: the withdrawal of preferential treatment for large-size families, the liquidation of the maintenance fund, changes in the forms of support for broken families 7.

Over the whole transformation period, no government has managed to work out a uniform, consistent system of family-oriented policy. Changing solutions and programs, accompanied by changing Cabinets have not encouraged permanent solutions in the area of policy on fertility and family. Certainly, these policies do not directly translate into changes in fertility in Poland.

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⁴ The document was drawn up at the Ministry of Economy, Labour and Social Policy, Warszawa 2002-2003

⁵ Act of 28 November 2003 on Family Benefits, The Journal of Law No. 228, item 2255.

⁶ The threshold is counted in two variants: One variant - for a four-person family (parents +children aged 7-17 and 18) and the other – relating to families with a disabled child.

⁷ More comparative information in Appendix 1.

5. Family Policy in Russia – selected consideration and debates

Privatization of small state enterprises in Russia occurred quickly during 1992, and by mid-1994, approximately two-thirds of all public enterprises had been privatized (Field, Kotz, and Bukman 2000:164). These events ushered in an economic depression based on massive unemployment and wage arrears in many state sectors that did continue to exist. Additionally, market reforms brought the end of price controls and the state's reducing of subsidies for housing and childcare. Health care, always underfunded, suffered more severe shortages in the move towards an poorly devised insurance-based system, and patients have increasingly borne the brunt of medical costs themselves (op cit, 164). The state has also refused to regulate the private sphere in systematic and considered ways, in order, for example, to enforce protective legislation against discrimination, to uphold maternity leave rights, etc. One result of this depression has been sharp deteriorations in all public health indicators: fertility decreased, morbidity and male mortality skyrocketed, and rates of infectious diseases including syphilis and tuberculosis grew exponentially.⁴ These processes resulted in a net population decline beginning in 1992. As in Poland, social assistance has increasingly come to be a matter for local regions to manage, and people are paying out-of-pocket expenses for many services. In 2001, a flat-rate income tax was instituted, in a governmental attempt to increase tax revenues. If under the progressive tax system in place prior to this revision the poor paid 1% tax and the rich paid 40%, they are now taxed at the same rate. Income disparity has increased: the richest 20% of the population account for over 46% of all income, while the poorest 20% account for 5.5% of all income. The minimum wage is below subsistence level, with the rich earning on average 14.8 times more than the poor (Biyanova 2005). Finally, in August, 2004, Putin passed far-reaching reforms in social benefits that replaced universal entitlements with cash payments to recognized needy groups. Targeted cash assistance seems to be emerging as the new means of social welfare. The policy is still not fully implemented and requires close analysis as an ideological and political instrument. The effects this reform will have on household economies, individuals life course strategies, and family formation also requires close scrutiny.

Although we have not yet completed a comprehensive analysis of periods of social benefits reforms in Russia as discussed above for Poland, we do see a similar trend in regional governments recently augmenting child allowances. Child allowances are provided as both a one-time benefit and a monthly supplement from birth until s/he begins school, but that decreases after the child's first birthday. The amount and terms of these allowances vary from locality to locality; some are targeted at needy groups, others at young parents, others are universally accessible. During the mid-1990s, child allowances were very insubstantial-- so small that many women in St. Petersburg did not bother to register for them. At present in St. Petersburg, parents receive a one-time payment of \$314 (R 8,713.60) if they are registered at the maternity clinic at least 20 weeks prior to the birth; if the family income is lower than the average of 2,919.40 per month, the parents receive a monthly benefit of R 1,2404.80 for the first year of the child's life, and R 248.80 per month for the second year (Muhm 2005). (R27 = \$1). In Moscow, parents under 30 years of age receive a one-time allowance of R 16,000 for the first child, R32,000 for the third. In the Central, Volga and Siberian regions there is a one time allowance for newborns of R6500 (comprised of R4500 given at the workplace, R2000 at residence), and a R500 monthly child care allowance. In Bashkiria and Udmurtia, in the Caucasus, the local governments are offering housing and utility benefits, beneficial terms of loans to young families for buying housing, and the possibility of amortization of loans for large families.

The effects of such policies need to be studied and analyzed. In the past, entitlements and child allowances have seemed to shift the timing of births but not the overall number of children (Zakharov and Ivanova 1996). What is clear is that a tension exists between socio-economic policies of market reforms that aim to withdrawal state intervention in citizens' lives and abrogate state responsibility for social welfare, on the one hand, and a pronatalist demographic policy consisting of economic incentives to promote families and childbearing, on the other hand. Against this background, public discussion over fertility and societal development since 1992 has accelerated, the pitch of debate taken on a tone of moral panic for national survival.

Demographic Debates

Vibrant discussion over the country's "demographic crisis" has been underway since the late 1960s, but anxious Russian legislators and nationalist activists confronted the onset of negative population growth rate occurring since 1992 with nothing short of panic: they have re-defined the "demographic crisis" as the "dying-out of the nation" (Antonov and Borisov 1991; Khorev 1995; Antonov, et al. 1995; Semenov 1996). The stakes appear extremely high at present, with numerous campaigns underway to convince state officials to draft a national demographic politics. Still, there are important distinctions and disagreements between demographic observers in Russia which shape policy recommendations presented to the Duma and President. Three major positions can be distinguished:

Free-Choice Liberal Perspective: This prominent group of demographers views low fertility as an expected process in line with the second demographic transition and not necessarily a negative phenomenon for Russia. They oppose pronatalist interventions as both unrealistic and unethical in a free, democratic society. Nonetheless, they recognize that below replacement fertility, combined with high levels of mortality, pose problems for the country's future. Their policy recommendations strive to overcome Russia's demographic problems by reversing the dire trends in morbidity and mortality, strengthening the economy, and improving the public health, rather than trying to engineer higher fertility rates. Since the Soviet era these scholars, led by Professor Anatolii Vishnevskii of the Russian Academy of Sciences, argued against directed pronatalist interventions, maintaining that families should have the right to make their own choices about childbearing. Limited, indirect support of childbearing could be provided, they insisted, by offering better social services, childcare, and health care resources such as contraceptives. Since the emergence of negative population growth and the latest pronatalist panic, these scholars have reformulated their argument about low fertility specifically to counteract self-proclaimed patriots' sensationalist laments that the nation is "dying out." They underscore universalizing trends of fertility decline found throughout the world, and highlight instead the urgency of addressing specific causes of morbidity and mortality, including alcohol abuse, cardio-vascular disease, and trauma, which have had substantial effects on life expectancy for Russian men Vishnevskii 1995, 2000).1

<u>Pronatalist-Communists and Nationalists:</u> This coalition consists of several different groups and arguably represents the most politically active segment of demographic campaigns. Until recently, the Communist pronatalists were led by Professor Boris Khorev (now deceased) of Moscow State University; presently, the Orthodox Church has become one of the most active advocates of the anti-capitalist, nationalist perspective. They emphasize that families are reluctant to bear children given the pervasive uncertainty of finding a job, having one's salary go far enough to fulfill basic needs, and keeping the job (Khorev 1997). Communist solutions include returning to a centralized economic system with stable prices— including even the rationing of basic foodstuffs—with extensive social welfare programs. While such reforms are not widely supported, their acknowledgement of the intense economic vulnerability facing millions of Russians gives voice to the experiences of the nation's majority.

Another arena of social policy advocacy involves attempts to restrict abortion. It is notable that in Poland, the criminalization of abortion was among the first legislative acts of the post-socialist government. The power of the Catholic Church as an opponent of socialism and the legitimacy of religious revivial as a central part of nation-building in the aftermath of state-sponsored athesism were decisive in this change, rather than demographic concerns. In Russia, demographic anxieties have been increasingly conjoined with calls for restricting abortion, sex education, and the promotion of contraceptives, as a means of ensuring spiritual revival. Thus, communist activists join nationalists in highlighting connections between low fertility and the supposed loss of family values. Examples of their legislative efforts include draft bills to ban abortion and legalize polygamy with the aim of ensuring that no woman remains without a husband and children (Semenov 1996). This is claimed necessary because, in the words of the former deputy chief of the Duma's Committee for Women, Children, and Youth, single women become "prostitutes who fail to reproduce," or the "lovers of married men," ruining the happiness and reproductive possibilities of other families (Semenov 1996). While such bills have so far been thwarted, nationalists have succeeded in hindering the fledgling family planning and sex education programs inaugurated only with the end of the Soviet Union (Medvedeva and Shishova 2000; Bateneva 1997, 1998; Novaia Gazeta 1999:13). While anti-abortion, anti-contraception positions represent the most extreme perspectives not shared by the majority of the public (Borisov, Sinelnikov and Arkhangelsky 1997; Perevedentsev 1999:32), state funding for family planning programs has ceased in the face of pronatalist and nationalist pressures. Currently, funding is the responsibility of local regions or NGOs, a situation that results in people's uneven access throughout the country. Such local family planning programs are also vulnerable to charges of national betrayal by activists who claim that contraceptives are antithetical to national interests (as when governmental roundtables on Family Planning as a Matter of National Security are held).

<u>Church's View:</u> The Orthodox Church views the problem of low fertility as one of the "loss of spiritual values" in society associated with both the legacy of socialism and market reforms. In conferences on "Spiritual-Ethical Bases of Demographic Development of Russia" held in October, 2004, and "The Family and Future of Russia" in February 2005, Church officials framed the issue of developing effective governmental demographic policy as having "the most important

significance for the future of Russia and the strengthening of national security" (demoscope.ru 2004 0175). According to the Church, there are numerous reasons for the demographic decline. Yet there discussion tends to highlight perceived problems of "egoism, comfort, freedom from morals" related to both mass media messages and a supposed undisciplined lifestyle. "Limitless egoism" leads people to neglect childrearing, even abandon their children, in mass, they argue. Policy recommendations from the Church include three main approaches, which partially overlap with the recommendations of Economically Liberal Pronatalists, to be discussed below: 1)Reviving social and governmental respect for the necessity of maintaining the traditional family as the most important value through educational programs such as a school curriculum on "the Basis of Orthodox Slavic Culture" that aim to promote a restoration of religious values and instill in people a desire for children; 2) Creating a system of state assistance for families, including assistance for adoptive parents to encourage care for the millions of children in orphanages; 3) The fight against abortion. On this last issue, the Church has advocated for an end to government financing of contraceptives, attacking global consultants and organizations promoting family planning; prohibition against abortion advertisements, and anti-abortion advertisements; censoring all mass media messages against family life, ending of international adoptions of Russian orphans.

<u>Subject of Abortion</u>: The anti-abortion struggle has enjoyed some success. In the summer of 2003, the Ministry of Public Health established the first restrictions on second-trimester abortions since the Stalin era. The new rules limit abortion to the first twelve weeks of gestation except under conditions of rape, imprisonment, the death or severe disability of one's husband, or the loss of parental rights, cancelling previously acceptable criteria known as "social reasons, including unemployment, refugee status, and other poverty-related problems" (Pravitel'stvo RF 2003)ⁱⁱ

Economically Liberal Pronatalists: Noncommunist pronatalists reject the argument that fertility decline is an outcome of market reforms (Perevedentsev 1999). Instead, they view a main source of declining fertility to be the lack of "family values" in society. This position is best represented by Professor Anatolii Antonov of Moscow State University, whose writings on the need to revive the traditional Russian family have included vehement attacks against non-nuclear families, single mothers, and supporters of gays, lesbians, and disabled people (Antonov 1995:183). In Antonov's view, rampant consumerism and materialism have been key to a "diminished desire for children" that he believes contributes to decreasing fertility. Moreover, the decline in the value of children and family life, he says, is buttressed by the loss of an economic interest in childbearing. The fact that childbearing today takes place for "exclusively personal motives" (1986:89), Antonov claims, occurs to the detriment of the society and nation. He advocates instead instituting policies that support the family as an economic unit of production, to give childbearing a material logic. He proposes the "privatization of the family" as a means of overcoming the socialist paternalism towards the family, with its subordination and attitude of dependency among the population, which waited for family entitlements of various types (2000:30). Instead, he advocates policies that would transform the family into a juridically recognized subject with rights and political sovereignty. The core of this position is Antonov's rejection of individual-based rights—of children, women, patients and disabled and elderly-- inasmuch as he believes that free personal choice often leads to irresponsible decisions from the perspective of society's demographic

interests (33). Attacking Vishnevskii's position that "The most important issue is not how many children on average a woman bears, but the degree to which the number of children she bears and the timing of their birth are the result of her consciously made decision" (Vishnevskii, *The Demographic Revolution* 1976, quoted in Antonov and Sorokin 2000:30), Antonov and Sorokin counter that human rights must not be allowed to include the right to few children, no children at all. Antonov advocates creating the autonomy of the family through strengthening the family production on the basis of the unification of work place and home, reviving a class of housewives with pension guarantees, a family wage, realization of tax and credit system to benefit young families and a host of other measures in the framework of the importance of the family politics principle: income- taxes-credit ensuring the real opportunity for acquiring a decent income for households.

6.Summary and Future Directions for Study

The socio-economic transformations of the last decade and a half in Poland and Russia culminated in a crucial cultural turning point. For many people suddenly, the situation changed unpredictably. According to Sztompka (2002, p 509) all the principles which seemed to rule everyday life, conduct and behaviour were reversed; individualism replaced collectivism, quiet safety of poverty was replaced by the risk of innovation and initiative, instead of taking refuge in family privacy – people faced the pressure to be publicly active; social benefits were replaced by individual effort and responsibility. The shock resulting from these changes is called a 'cultural trauma' by the author. Three symptoms of this trauma seem to be the most important: a lack of confidence, moral anomie and provincial identity. Simultaneously, Poland and Russia have been undergoing the processes of globalization, if in different ways: Poland has recently joined the EU. All this, combined with these traumatic processes described above, may lead to even more aggravated trauma. Both countries' reforms have enforced major institutional changes. Changing institutions and newly emerging ones enforce the modification of daily habits and the assumptions of what makes a normal life. Hence, economic and social changes connected with the introduction of the market mechanisms, must be seen as having concomitant cultural and institutional transformations—all of which also affect demographic processes. Fresh perceptions, intentions, attitudes, behaviours and decisions emerge, reshaping life courses.

In both Poland and Russia, the relationship between the state and institutions on one hand, and family (household) and individual on the other, has changed. The mechanism of these changes lies predominantly in the cancellation of the state and institution-provided social benefits granted to citizens, families and households, which used to be of significant importance to their financial situation. Thus, the responsibility of household members for its financial situation grew, which gave raise to frustration and uncertainty. Crucial changes occurred in the model of family-oriented policy which had been functioning in Poland and Russia under socialism, and which had adopted a decisively birth-oriented direction in some periods (e.g. the 1970s and the 1980s). The first group of changes was linked to new principles in social and family-oriented policy. The principle of welfare state was abandoned and replaced by targeted, means-tested benefits. The role of the state became limited and the responsibility for the well-being of the family was placed on its members. Poland switched from the model of providing permanent support to all families with children to selective support in 1995. This selectivity is justified as ensuring better social

justice and more effective running of public finances. It is considered the only possible solution in the current socio-economic conditions. In neither country are current family allowances integrated to form a single, unified system: local and regional governments are making policy decisions on family life now. The crisis of public finances limited the capability to subsidise family benefits (Balcerzak-Paradowska 2002, p 35). In Poland in 2001, the necessity to cut expenditure from the state budget brought about some solutions including shorter maternity leave, cutting the income threshold for some categories of family benefit. This resulted in restrictions on the number of beneficiaries and reduced the expenditure from the state budget. It should be clearly underlined that changes in the model of family-oriented policy were accompanied by if not actually realized through changes in social policy in Poland⁸.

Finally, the multidisciplinary approach characterizing our work points to the finding that policies on low fertility, whether situated within family policy, social policy, or population policy, constitute simultaneously economic and cultural forces in people's lives.

We have highlighted in this paper the ways that socio-economic policies, entail statements of the state's obligations (or lack of obligations) to citizens, citizens obligations to themselves, and to the state/society. These statements, in turn, represent ideas and values, often ideas that are in the process of being debated and challenged. As these debates turn into actual policies or laws, the state is undertaking both economic and cultural work. Thus, by offering money, or withholding social assistance, or changing the ways assistance is conceptualized and distributed, the state is not just addressing economic conditions, it is proposing (often new) values, ideas, and norms—a kind of cultural work. The question of course, is – what is the effect of this cultural work of the state on people's lives? How do they respond to policies, interpret them, re-interpret them, etc.?

As Philipov's recent work (2001) emphasizes, life in Eastern Europe is filled with uncertainty, disorderliness, discontinuity, experiences. These experiences, shaped by both economic and cultural changes, reveal that cultural ideas and economic conditions cannot be separated: they are mutually constitutive of each other and require combined analysis. This moreover, requires attention to the question of social stratification in fertility and policy analysis. People's ideas about their lives, the world, and how to act in the world (to enter a union, use contraception, have a child, have another child, etc. etc), as well as their actual decisions and behaviors, can only be understood in relation to their social context-- meaning, where they are positioned in a stratified socio-economic environment, both vis-a-vis the state and other groups in society. Philipov (2001:13) also seems to suggest that economic and cultural forces work in tandem. For example, in trying to understand the relative impacts of economy and culture on fertility, he states: there is "more than just pure ideational changes. The discussions evolve around female and young adults' labor force participation, conflicting roles of a working mother, rising education. As a consequence it interacts with the economic approach discussed above. Such an interaction is not surprising given the commonality between social, economic, and cultural change."

M.Malinowski, 2003.

⁸ More detailed information about the current and historical perspective of selected legal regulations pertaining to children and family in Poland is presented in paper by E.Fratczak, M.Kulik and

Thus, in considering future approaches to the question of the relationships between policy and low fertility, we propose to examine the interrelations of economic and cultural processes in asking what the notion of "policy on low fertility" means, what the scope of action on low fertility covers, and how the focus and direction of policies related to family relate to a country's socio-economic development and the political (or ideological) context of debate in a given country or region.

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Appendix 1. Situation of family and family benefits in Poland (under the former and present systems)

Social benefits under the former system (before 2003)	situation of family	Social benefits under the present system (after 2003)
-maternity leave and allowance - temporary maternity	Birth of a child -working woman - mother on low income	no changefamily benefit + one-time
allowance	(in poverty) - mother is a farmer	supplement
maternity allowanceone-time maternity grant on child birth		- family benefit + one-time supplement
-care leave and care allowance -maternity leave	II Childcare - families of occupationally active persons	- no change
-upbringing allowance	-families of working persons on low income III Child raising	family allowance + supplement on child care leave
-family allowance -none	- families on low income - beginning of school year	-family allowance - family allowance + supplement on beginning of school year
-none	- child's in education outside place of residence	- family allowance + supplement on education outside place of residence
	IV. Families in difficult situation Broken families	
- allowance from maintenance fund - preferential criterion for family benefits	- on low income	- family allowance + supplement lone parenthood
- child care leave and allowance (preferential amount and period of payment, eligibility criterion)	- with occupationally active father/mother Large-size families	- family allowance + supplement for unemployed lone parents
- preferential family allowance - career's allowance	- on low income	- allowances granted under general regulations, cancellation of preferential

- permanent allowance for persons who leave employment	Families with disabled child	treatment - family allowance + supplement on using child care leave on general principles
- preferential family allowance -career's allowance	- on low income	- higher eligibility criterion for family benefits
- permanent benefit for		- career's allowance
persons leaving		regardless of income
employment		criterion
		- family allowance +
		supplement on education and rehabilitation of
		disabled child.
		- family benefit +
		supplement for lone parent
		of disabled child
		- career's allowance for
	- families of	persons leaving
- longer child care leave	occupationally active	employment
	persons	- child care leave
		supplement paid over a
		longer period

Source: B.Balcerzak-Paradowska Rodzina i polityka rodzinna na przełomie wieków (Family and family policy at the turn of the centuries), IPiSS, Warszawa 2004, Table 2, p. 234,235.

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ⁱ Vishnevskii, "Russia: The Demographic Situation."

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