
Władysław Adamski
Katarzyna Pelczynska-Nalecz
Wojciech Zabowrowski

EuReporting Working Paper No. 2

Towards a European System of Social Reporting and Welfare Measurement

A TSER-Project Financed by the European Commission

Subproject European System of Social Indicators

Polish Academy of Sciences
Institute of Philosophy and Sociology
Warsaw 1999
## Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>3</td>
</tr>
<tr>
<td>1. Thirty Years of Academic Research</td>
<td>4</td>
</tr>
<tr>
<td>1.1 Living Conditions and Needs of Polish Society: Surveys 1982-1991</td>
<td>4</td>
</tr>
<tr>
<td>1.3 Research on Political Participation 1980-1995</td>
<td>7</td>
</tr>
<tr>
<td>1.5 Recent Surveys and Further Plans</td>
<td>9</td>
</tr>
<tr>
<td>2. The Most Relevant Public Opinion Research</td>
<td>11</td>
</tr>
<tr>
<td>2.1 Polish General Social Survey</td>
<td>11</td>
</tr>
<tr>
<td>2.2 Centre of Social Opinion Research</td>
<td>11</td>
</tr>
<tr>
<td>3. Central Statistical Office Research</td>
<td>13</td>
</tr>
<tr>
<td>3.1 Household Budget Survey</td>
<td>13</td>
</tr>
<tr>
<td>3.2 Living Conditions of the Society</td>
<td>14</td>
</tr>
<tr>
<td>3.3 Household Standing</td>
<td>15</td>
</tr>
<tr>
<td>Appendix 1: Polish National Surveys - Institute of Philosophy and Sociology, Polish Academy of Sciences 1981-1995</td>
<td>16</td>
</tr>
<tr>
<td>Appendix 2: Sequences of Questions Relevant to the Indicators of Economic Well-Being</td>
<td>20</td>
</tr>
<tr>
<td>Appendix 3: Index of Political Participation</td>
<td>24</td>
</tr>
<tr>
<td>Bibliography</td>
<td>26</td>
</tr>
</tbody>
</table>
Introduction

The history of sociological research on social indicators and social well-being in Poland goes back as far as the early seventies. It can be directly linked with a "double crises" of "distribution" and "political legitimacy" that unexpectedly erupted in this country at the end of 1970. Seriously frightened by this crisis-conflict situation the Party-government leaders decided to spend a substantial amount of money for social research. Thus, a new interdisciplinary project on "Expected Changes in Consumption Patterns, Cultural Needs and the System of Values of the Polish Society" had been set up in the Institute of Philosophy and Sociology, Polish Academy of Sciences, with Professor Jan Szczepanski, Director of the Institute, as its co-ordinator. The vast range of empirical studies undertaken by this project in the years 1970-1975 (and continued through 1980), was "to define the trends in the structure of individual and collective consumption patterns, cultural needs, and aspirations of the various groups of the population." The results were intended to be used in the formulation of the program of social policy and of social planning and for forecasting the "processes of socialist society formation".

The main concern of this project was to build an empirical and theoretical background for such a new type of social policy that would be instrumental in fighting the crisis situation. This policy assumption, and especially its explicitly pronounced goals: "to raise the living standards and to use consumption as a driving force in socio-economic development" were supposed "of necessity bring about changes in the social and political behavior of the population." The objectives of the project defined in this way combined various scientific, economic and ideological elements. When the project was begun its principal theoretical and empirical studies (concerned with consumption patterns, systems of values, and cultural needs) were located not only in the field of economics and sociology, but also psychology, the philosophy of man, culture theory, etc.

Such an interdisciplinary approach was, however, conceived not only as an instrument for building a "new socio-economic policy, that could be used in order "to optimise and rationalise consumption methods at the disposal of planned economy"; at the same time it was strongly concerned with the structural relationship between economic dimensions of consumption patterns and their cultural aspects, i.e. value preferences" (see: J. Szczepanski 1976, 1978). In spite of the fact that such an ambitious research project was unable to prevent the re-emergence of even more serious crises and conflicts (as actually happened in the years 1980 and 1989), its substantive and methodological outcomes were positively utilised in the consecutive research of this type undertaken in Poland before the breakdown of the state socialist system, as well as in the time encompassing the comprehensive transformations.
1. Thirty Years of Academic Research

In this part of our report we present data from several research projects conducted in the Institute of Philosophy and Sociology of Polish Academy of Sciences (IFiS PAN) - until 1989 the leading institution responsible for this type of research.

In the sixties and seventies two standard indicators of economic position were used in the studies of Polish society: (1) one-dimensional indicator income per capita in household and (2) multi-dimensional indicator built on the basis of household furniture (Beskid 1982, 1992; Slomczynski 1989). Findings of other research on social structure mobility, inequality and differentiation of ways of life appeared to be significant for Polish-Finnish comparison. Detailed multi-variable measurement as described were performed and developed in a comparative Polish-Hungarian perspective (Andorka, Zagórski 1980).

In the eighties, during a sharp crisis of the Polish economy with accompanying social-political conflicts, sociologists took an interest in how people cope with economic difficulties and political tensions. The first research entirely devoted to this topic was conducted in the Institute of Philosophy and Sociology, Polish Academy of Sciences, by the research group directed by Prof. Lidia Beskid. A set of variables relevant to individuals’ economic position and its changes was developed.


In October 1982, a questionnaire survey on the subject "Living Conditions and Needs of the Polish Society 1982", was carried out by the research group of Professor Lidia Beskid. The scope of the survey was determinate by several cognitive goals and by the requirements of the practice. The survey included:

a) a questionnaire "Household", describing the demographic situation and the basic elements of the financial status of the family,
b) a questionnaire "Living conditions and needs of Polish society", the aim of which was to determine the goals, life aspirations, and consumptive aspirations of 5.317 adult members of randomly selected households,
c) registering, in 451 households the regular expenses and consumption behaviour, specific for the period of acute crisis and under the system of food rationing,
d) monthly registering in 451 of the households of consumption and of the current expenses in October 1982; particular attention being paid to the sources of the goods and to the influence of provisions and various gifts on current consumption,
e) registering the 24-hour time budget of 1.016 adults in 454 households.

The cognitive aims of this research were considerably broadened by the fact that it refers to similar research on a national representative sample carried out in 1975, jointly by the Institute of Basic Problems of Marxism-Leninism CC PUWP, and the Central Statistical Office (GUS). The results allowed researchers to confront the objective parameters of financial status of those questioned and their attitudes and opinions on the economic and social conditions under economic growth (1975) and under acute stress on the level of quality of life (1982).
The most important results of the investigations carried out in 1982 include:

1) analyses of the level and diversification of the objective financial status of the population in Poland at the end of 1982 and of their social perception,
2) the presentation of the ways in which households amass resources for consumption during periods of crisis and the analysis of mechanisms by which levels of consumption are maintained,
3) a study of the impact of value-orientation on the way in which needs are fulfilled during periods of crisis, with particular attention paid to life aims and aspirations,
4) a socio-economic typology of individuals and their situations.

This research scheme was developed under the conditions of deep economic depression in the eighties that was followed by shock therapy of the Polish economy in the nineties. Sets of indicators of well-being and deprivation were elaborated as well as different strategies of coping with economic difficulties were described (Beskid 1995). The samples of households were derived from Central Statistical Office (GUS) database.

It is worth noting that living conditions and preferred vs. possible ways of life of different segments of Polish society were simultaneously carefully investigated and described by another group of sociologist on the ground of humanistic sociology perspective (Sicinski, Wyka 1988).


At the same time another group of researchers, primarily concerned with political attitudes and the perception of conflicts of the Polish society, has initiated a time series type of sociological surveys, widely known as the "Poles" studies (project led by Prof. Wladyslaw Adamski).

In 1980 Wladyslaw Adamski and his nine collaborators initiated the series of surveys - continued in 1981, 1984, 1988, 1990 and 1995 - focused on social crisis and societal conflict in Poland. The following problems were raised:

(1) What social forces and psychological mechanisms were involved in generating the crisis of distribution of economic goods at the societal level, turning the crisis into one of legitimisation and thus allowing political conflict to erupt between state employees and those in authority responsible for government policy?

(2) What kind of structural, cultural and systemic peculiarities have shaped the dynamics and durability of the crisis/conflict syndrome? In seeking answers, one should not ignore, on the one hand, the sources of needs and, on the other, the policies and strategies used by the government in approaching this revolution of rising expectations.

(3) What were the structural sources of vitality of hidden and open conflicts. Or, more specifically, was there, and still, is there a chance for conflict accommodation through the
absorption of social forces opposing or contesting the political status quo into government-sponsored programs of systemic transformation?

The conclusions to be drawn from the surveys "Poles" in 1980, 1981, 1984 and 1988, can be summarised as follows:

1) In spite of the deep economic crisis of the Polish economy, (only in the years 1980-1981 there was a dramatic drop of GNP at the rate of 25-30 percent) the level of individual and family needs and aspirations reached before the crisis - and it applied above all to skilled manual workers and professionals of the post-war generation - was tending to become consolidated and autonomous, i.e. unrelated both to the real institutions available to the State and to the efficiency of its economic and political actions. Consequently, regardless of the crisis, people still expected the government, if not to improve their living standards, at least to satisfy their achieved existing levels of needs and aspirations. The emergence of strongly autonomous needs and aspirations not only added to the emotionally loaded rejection of any State attempts to bring workers’ expectations into line with what the economy can produce, but it also helped to translate unmet economic demands into feelings of deprivation and rebellion.

2) The feelings of economic and political deprivation that were especially prevalent among the younger generation of skilled workers and specialists made them extremely sensitive to any existing social inequalities and, in particular, to perceive those in power as undeservedly privileged. This psychological mechanism of transforming deprivation into aggression seemed to be facilitated by the propensity - of deprived individuals and social groups - to perceive those in power as their main reference group, and consequently, as an alien "them group".

3) Heightened by a socialist ideology, but systematically unmet needs and aspirations reached the level of obligation (to use Chombart de Lauwe’s term) and hence contributed to a growing awareness of separate group interests among basic social categories, and primarily among skilled workers and specialists in large industrial enterprises. When such a hidden conflict evolved into an open protest movement, the phenomenon of group awareness also embraced the people in power - especially party officials, managers and their closer dependants, who increasingly felt threatened in their positions and inclined to behave as if they were a "quasi-class" (Dahrendorf’s term) or an interest group.

4) While the Community of interests among skilled workers and specialists should be viewed as being rather weakly structured and temporary in character, the group interests among the Party officials and managers were more strongly based in their privileged position in exercising power. This enabled them to present their own group interests as those of society in general and of the socialist system itself in particular.

5) Given the strength of potential conflicts in Polish society as a whole, and among the employees of major industries in particular, it seemed likely that in Poland the process of political and economic restructuring of the system would be pursued at a deliberate pace and that the idea of power-sharing would have to cope with the threatened group interests of the political and managers who would like to preserve their control over the state run economy.
The most complex study in the "Poles" series was the one conducted in 1995 and sponsored by the European Community. The members of this team were: W. Adamski (project director), I. Bialecki, L. Kolarska-Bobinska, A. Rychard, K. Pelczynska-Nalecz and W. Zaborowski. It was realised on the national sample comprising 2000 men and women. Some parts of the questionnaire used were replicated from the earlier studies. This survey is focused on different aspects of social change, i.e. adaptation to new conditions, social deprivation and aspirations, increasing social inequalities and their. (The name of data file is POLES 95).

1.3 Research on Political Participation 1980-1995

In Poland under state socialism - in comparison to other East European countries - relatively much research on political participation was conducted. This research differed considerably from that conducted in West European democracies, as analysis of political participation in authoritarian systems required completely different methodological and substantive approaches.

In Poland before 1989, like in every other authoritarian system, the possibility of citizens to influence the government policy was limited. Voting in elections or joining Party were usually passive "ritual" behaviours. Any effective pressure on the democratic transformation of the system was linked with such illegal actions as strikes, boycott and other forms of social protest, that paved the way to the emergence in 1980 of an independent movement named "Solidarity". Encouraged and protected by this powerful organisation the Polish researchers were able to initiate and pursue equally independent research on the most sensitive political issues. They were aimed to explore the nature, extent and social background of various forms of such specifically Polish phenomenon as openly anti-government contentious movement. Except of research group integrated around the "Poles" project, in this new-discovered field of study there were also active sociologist and political scientists from Warsaw University. The most efficient among them were: research team of Prof. Jerzy Wiatr, Institute of Sociology (Raciborski, Wiatr 1987) and a research group co-ordinated by professors F. Ryszka and S. Gebethner, at Political Sciences Department.

After 1989 voting behaviour became one of the most popular research problems. Questions concerning participation in elections and socio-psychological features of voters and non-voters were systematically asked in research projects conducted in the Institute of Political Studies Polish Academy of Sciences, PGSS and surveys conducted by CBOS. (Gebethner 1995; Grabowska 1995; Jasiewicz 1993, 1995; Raciborski 1991, 1997). At the same time, after 1989 Polish researchers devoted considerably less interest in non-conventional forms of activity. Aside from protest behaviour studies, continued within the framework of the project "Poles" (Pelczynska-Nalecz 1998), only a few analyses based on GUS data were published (Ekiert 1994; Ekiert, Kubik 1997). Membership in political parties and other organisations, interest in politics and local political participation were basically left out of the main analyses of Polish sociologists.

In 1978 K. Janicka, J. Koralewicz and K.M. Slomczynski initiated a partial replication in Poland the well known Kohn-Schooler study on social structure and personality. The Polish survey was conducted under the auspices and with the financial support of the Polish Academy of Sciences. The measures of basic social-standing variables i.e. occupational status, formal education, job and income – were adopted from the previous Polish attempts to test and adopt the Kohn-Schooler questionnaire. Some questions pertaining to parental values, self-conceptions, and social orientations, were directly adopted from the Kohn-Schooler 1964 questionnaire. Other questions, relevant to such orientations as approval of novelty, trustfulness, self-esteem and anxiety, are included in Appendix 2 -- as the indicators of psychological functioning under the conditions of radical social change. The sample was designed to represent men, aged 19-65, living in urban areas, and full-time employed in civilian occupations.

A new survey was conducted in 1992 by Kazimierz M. Slomczynski (project director) and Krystyna Janicka, Bogdan W. Mach, and Wojciech Zaborowski. In this survey, researchers decided to abandon the sample’s original limitation to men only. That limitation was first of all introduced in order to expand the sample by including also those individuals who are economically inactive, such as housewives, job applicants, retirees, and disable pensioners, as well as school and university students. Thus a representative sample of urban residents at the age of 19-65 was set up. (The data file is called PSYCHOSTUDY).

In 1987-1988 the Institute of Philosophy and Sociology of the Polish Academy of Sciences sponsored a large research project on social structure and mobility in contemporary Poland. The research project aimed at a comprehensive description of social structure and mobility to be analysed from the class-conflict, functional, and to some extent also humanistic perspectives. The research team included K.M. Slomczynski (project director), I. Bialecki, H. Domanski, K. Janicka, B. Mach, Z. Sawinski, J. Sikorska, and W. Zaborowski (1989). This project was deeply rooted in tradition born in the sixties and intensively continued in the seventies and early eighties, a long-standing tradition of social structure research elaborated by W. Wesolowski, K.M. Slomczynski, E. Wnuk-Lipinski. (Wesolowski, Slomczynski 1970; Slomczynski 1989; Wnuk-Lipinski 1989, 1992).

The empirical part of the 1987-1988 study consists of two surveys on national samples. The first sample embraced economically active men (aged 18 to 65) and women (aged 18 to 60). The field work of the first survey (N=2,000) was completed in mid-1987. A large part of the questionnaire used focuses on newly studied areas, e.g. ways of acquiring scarce goods on the open market -- from cars to colour TV sets. Since the Polish economy was then almost completely disorganised, the importance of informal contacts increased with respect to household management. Using a battery of questions the authors intended to determine who helps whom, in what domain, for what reason and with what effect.

The second survey, conducted in Autumn of 1987 and Winter of 1988, was based on a larger national sample (N=6,000) of men and women, aged 21 to 65. This survey was meant to
gather information primarily on social mobility, both intra- and inter-generational. Social mobility was understood in a very broad sense, including its political and cultural aspects.

In 1993 a panel study was conducted. A sample (N=2,200) of those interviewed in 1987-1988 were re-interviewed in their homes. The data of this panel study are available. (The file from this study is called PANELSTUDY.)

In the nineties one more issue, in addition to the above four mentioned, i.e. adaptation to rapid social change (in the course of transition towards democracy and market economy) was introduced to the sociological studies. Several indicators of such adaptation were worked out by the research group led by Prof. Kazimierz M. Slomczynski and then were implemented to the study "Poles ‘95" as a result of co-operation of the two groups of researchers.

A concise description of the surveys realised by the above mentioned groups are presented in Appendix 1.

The samples of the above mentioned surveys were derived from the database of the Government Computer Science Centre PESEL. This database is used for the purposes of recording current population statistics (births and deaths, changes of residence addresses, travels abroad) as well as for special projects (for example, maintenance of voter registration). PESEL data is the only registry of Polish population statistics that is updated on a regular basis. Specifically, these data include such important characteristics for sample selection as deaths and change of residence information.

The PESEL database includes all information essential for the selection of a sample that meets the requirements specified above. This information includes the year of birth and the territorial unit code number under the Central Statistical Office classification system, which makes it possible to determine whether a given administrative unit is an urban centre or a village. Records containing last and first names, as well as addresses, enable identification of randomly selected individuals. The national sample included people selected from 223 urban centres located in 49 provinces (voivodships). The distribution of selected individuals by age and gender was analysed. Chi square values demonstrated that the structure of the used samples fits very well the structure of the population.

1.5 Recent Surveys and Further Plans

As a result of many years of co-ordinated work done by the three specialising on research on social structure groups of sociologists sequences of questions relevant to the indicators of economic well-being (including economic success during transformation) have been established. These sequences of questions as well as questions pertaining to psychological well-being (Appendix 2) is actually used in the research project conducted by the Institute of Philosophy and Sociology, Polish Academy of Sciences. This project is realised on the base of the following samples:

1. national sample of 1998 (project led by Prof. K. M. Slomczynski),
2. panel samples for 1988-1993-1998(project led by Prof. K. M. Slomczynski),
3. Target samples of 1988 consisting of
   - respondents who achieved the economic success during the transition period (project led by W. Zaborowski)
   - respondents who were economic losers during the transition (project led by K. Janicka).

To prepare the 1998 survey three main data sources have been used: (1) panel study 1988-1993 on social structure change, (2) 1992 survey on social structure and personality, (3) 1995 survey on social inequality, actors of systemic transformation and political attitudes (Poles'95).

Further research plans are as follows: Wladyslaw Adamski is going to continue his project actually labelled as a study "Poles of the Year 2000". Except of continuing of the main research topics from the earlier time series this project will need an elaboration of new variables enabling us to measure what does it mean "to go ahead" in the process of systemic transformation, who is going ahead and what are the motives of those who go ahead.

We believe, that in order to reach this goals we should prepare a comprehensive set of variables. They have to deal with the rapidly changing respondents’ position in the social structure - well being on the one hand, and deprivations on the other hand. Our principal goal is to capture new elements of a changing reality, as well as to create a better measurement of social and economic position of both individual's and social groups in a changing social structure; it would also allow us to prepare more powerful predictors of other important variables.

In fact, correlations between different variables relevant to economic well-being are not - in the case of transforming Poland - very strong (see: Tables 1 - 3). This implies that constructing scales, like the scale of economic success, including at least three or four variables (correlation between three variables scale and four variables scale in 1992 was close to one - .924) was the best predictor of support for systemic change in Poland, and - what is crucial - relative to other variables (i.e. social stratification position or education) better in 1995 than in 1992.

Our further research plans, and among them mostly the project "Poles of the Year 2000" is in progress -- will focus on the links between social standing, especially economic well-being and political variables, measuring participation and attitudes. Variables measuring political and social participation are considered as relevant to the concept of well-being, while exclusion, marginalisation or political alienation indicate deprivation, complementary to poverty. On the other hand, the ongoing social change forced people situated on different levels of the social hierarchy to pay a psychological price measured by stress and anxiety. Indicators of psychological well-being are presented in Appendix 2 and indicators of political participation - in Appendix 3.
2. The Most Relevant Public Opinion Research

2.1 Polish General Social Survey

Polish General Social Survey (PGSS) is a permanent research program conducted by the Institute of Social Studies of Warsaw University (ISSP). The goal of the program is to take yearly measurements of trends in social characteristics and opinions of Polish society. Every year the PGSS survey is conducted on a sample of 2,000 adult Poles. Data and full documentation of the survey is available to interested individuals and institutions. PGSS data are compared to those gathered in analogical research projects conducted elsewhere, i.e. in USA and Germany.

The main part of the questionnaire repeated every year includes:

1. socio-demographic variables,
2. variables describing social structure and inequality in objective and subjective aspects (e.g. income, economic standing of respondent and his family, perception of this standing),
3. variables describing social behaviours and preferences,
4. measurement of satisfaction of life in economic, occupational and family aspects, "enjoying life" scale.

Every year an additional problem module - worked out by an international research team - is included into PGSS survey and conducted in 21 countries.

2.2 Centre of Social Opinion Research

Centre of Social Opinion Research (CBOS) is the leading Polish institute of public opinion research. Since the early eighties, when it was created as a government agency, CBOS has continued systematic monitoring of social and political attitudes and dynamics of objective living conditions of Poles.

In the beginning of nineties a new set of well-being indicators was worked out and it replaced most of those used in the eighties. For the past several years these new indicators are systematically measured every month or every second month. Results of surveys are published in CBOS bulletins. Parts of them are available on the Internet.

Well-being indicators used by CBOS concern objective economic standing as well as perceptions of living conditions. Economic standing is measured by income per capita and goods and properties of household (in the questionnaire 30 different goods and properties, e.g. household furnishings and equipment, car, own flat, house, land are specified). Perception of living condition is measured on the basis of answers to the following questions:

1. What is your opinion about the present economic standing of your household?
2. How are things actually going in your household?
3. Which of the following sentences you would chose to describe your household budget;
a) We are poor. We don't have enough to satisfy our simple needs.
b) Our living standard is low. We must economise every day.
c) Our living standard is middle. We have enough to cover everyday expenses, but we must gather savings to buy anything extra.
d) Our living standard is satisfactory. We are able to afford much even if we don't economise.
e) Our living standard is very satisfactory. We can afford some luxuries.

All CBOS surveys are conducted on a random national sample of 1.100-1.200 adult Poles.
3. Central Statistical Office Research

Central Statistical Office (GUS) has conducted surveys on Polish household economic situation and living and work conditions of Poles for many years. Unfortunately very few results of these surveys can be used to conduct long-term dynamic analyses. The reason is that in the nineties GUS research program has been considerably modified in both methodological and substantial aspects. These modifications were made to adjust indicators used by GUS to new Polish socio-economic conditions and to make Polish statistics comparable to those of the European Union.

Three of the most important surveys conducted by GUS are Household Budget Survey, Standing of Polish Household Survey and Living Conditions of Polish Society Survey.

3.1 Household Budget Survey

This survey has been continually conducted since the sixties. Sampling procedures and the questionnaire were changed several times and now the survey is based on sampling and questionnaire initiated in 1993 and provides information on the level and structure of household income, furnishings and housing conditions. Respondents are volunteers and they are rotated every month. It means that every month different households (2,700 per month) are interviewed. Data are collected on the basis of:

1. Monthly lists of income and expenses written down in the respondent’s budget book;
2. Questionnaire containing basic information on the household that is filled once a month (the same questionnaire is filled out for households out of the sample);
3. Supplementary surveys that are conducted quarterly.

The results of this survey are available on diskettes and CDROM and in GUS publications (also in English): "Biuletyn Statystyczny" (Statistical Bulletin), "Budżety gospodarstw domowych" (Household Budget Surveys), "Warunki życia gospodarstw domowych" (Household living conditions).

The budget survey is not fully representative - as individuals living out of household, such as homeless, soldiers, residents of social welfare centres, are not included in the sample. However considering continuity of the survey, large sample and range of collected information, the budget survey is considered from many years to be a source of information on different aspects of living standards, e.g. income differentiation, model of expenses and consumption, and housing conditions.

Results of the household budget survey are used in analyses of poverty conducted by the research team led by Prof. Stanisława Golinowska in the Institute of Labour and Social Security Affairs. One purpose of these analyses is to construct indicators of poverty, e.g. minimum living standard, level of household wealth, housing conditions (Golinowska 1996).
3.2 Living Conditions of the Society

The survey was conducted for the first time in 1997 on a sample of 125,000 representative Polish households. The questionnaire used in the survey consisted of two parts:

I - Household part - questions answered by an adult member of the household, well-informed on family living conditions.
II - Individual part - questions answered by a randomly chosen member of the household.

The survey concerned various aspects of well being of the household and its members.

The questionnaire consisted of the following sections:

Part I
1. household members,
2. economic activity,
3. housing conditions and the level of wealth,’
4. property,
5. income,
6. taking advantage of other people and institutional help,
7. savings and debt,
8. nutrition,
9. medical care,
10. education of children,
11. culture and leisure,
12. opinion on household economic situation.

Part II
1. parents,
2. health,
3. disability, difficulties in everyday life,
4. professional career,
5. main employment,
6. looking for a job,
7. everyday life and leisure,
8. social contacts.

GUS is going to continue the survey Living Conditions of the Society. It is to be conducted in two variants:

1. every 5-6 years on a large sample using all the questions of the questionnaire,
2. every year on a smaller sample (consisted of about 4,000 households) using shortened questionnaire (including only some questions from Part I).

The results of both variants of the survey will be published periodically in GUS studies (first results from the 1997 survey have been published in October 1998). These studies include both simple distribution and synthetic indices. Actually GUS analysts are working out these indices.
3.3 Household Standing

The survey has been conducted four times since April 1994 on national samples of adults (consisted of about 2,500 respondents). It is a Polish replication of the Consumer Survey conducted in most European countries. The aim of the survey is to collect opinions on household economic conditions and readiness to consumption. Results - distributions and consumer confidence indicators - will be presented in GUS and EU publications.
## Appendix 1

Polish National Surveys - Institute of Philosophy and Sociology, Polish Academy of Sciences 1981-1995

<table>
<thead>
<tr>
<th>Survey</th>
<th>Year</th>
<th>Authors</th>
<th>Sample</th>
<th>Main Topics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Poles’ 81</td>
<td>1981</td>
<td>W. Adamski et al.</td>
<td>N=1.895</td>
<td>- income and welfare indicators</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>age of respondents - over 18</td>
<td>- party and trade union affiliation</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- needs and aspirations</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- perception of privileged groups</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- political attitudes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- needs and aspirations</td>
</tr>
<tr>
<td>Poles ’84</td>
<td>1984</td>
<td>W. Adamski et al.</td>
<td>N=2.349</td>
<td>- opinion on socialism and capitalism</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>age of respondents - over 18</td>
<td>- opinion on Martial Law, political</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>opposition and repression</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- other political attitudes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- needs and aspirations</td>
</tr>
<tr>
<td>Poles ’88</td>
<td>1988</td>
<td>W. Adamski et al.</td>
<td>N=2.349</td>
<td>- opinion on privatisation</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>age of respondents - over 18</td>
<td>- opinion on political opposition and</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>repression</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- needs and aspirations</td>
</tr>
<tr>
<td>Poles ’90</td>
<td>1990</td>
<td>W. Adamski et al.</td>
<td>N=1.099</td>
<td>- opinion on privatisation</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>age of respondents - over 18</td>
<td>- opinion on political opposition and</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>repression</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- voting behaviour</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- other political attitudes</td>
</tr>
<tr>
<td>Survey</td>
<td>Year</td>
<td>Authors</td>
<td>Sample</td>
<td>Main topics</td>
</tr>
<tr>
<td>------------------------</td>
<td>------</td>
<td>---------------------</td>
<td>-----------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Poles '95</td>
<td>1995</td>
<td>W. Adamski et al.</td>
<td>N=2,000</td>
<td>- job conditions</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>age of respondents - 20-60</td>
<td>- household (income, furnishings, financial difficulties)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- needs and aspirations</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- opinion on privatisation</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- opinion on political opposition and repression</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- voting behaviour</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- other political attitudes</td>
</tr>
<tr>
<td>Life Conditions and</td>
<td>1982</td>
<td>L. Beskid et al.</td>
<td>N=2,421</td>
<td>- socio-occupational position</td>
</tr>
<tr>
<td>Aspirations</td>
<td></td>
<td></td>
<td>age of respondents - over 18</td>
<td>- household (housing standard, income, furnishings)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- aspirations</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- strategies of coping with economic crisis</td>
</tr>
<tr>
<td>Life Conditions and</td>
<td>1986</td>
<td>L. Beskid et al.</td>
<td>N=920</td>
<td>- socio-occupational position</td>
</tr>
<tr>
<td>Aspirations</td>
<td></td>
<td></td>
<td>age of respondents - over 18</td>
<td>- household (housing standard, income, furnishings)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- aspirations</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- strategies of coping with economic crisis</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- consumption of food products</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- leisure time</td>
</tr>
<tr>
<td>Survey</td>
<td>Year</td>
<td>Authors</td>
<td>Sample</td>
<td>Main Topics</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>------</td>
<td>---------------------</td>
<td>---------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Life Conditions and Aspirations</td>
<td>1989</td>
<td>L. Beskid et al.</td>
<td>N=625 age of respondents - over 18</td>
<td>- socio-occupational position</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- household (housing standard, income, furnishings)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- voting behaviour</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- socio-occupational position</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- household (housing standard, income, furnishings)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- voting behaviour</td>
</tr>
<tr>
<td>Life Conditions and Aspirations</td>
<td>1991</td>
<td>L. Beskid et al.</td>
<td>N=</td>
<td></td>
</tr>
<tr>
<td>Social Structure</td>
<td>1987</td>
<td>K. M. Slomczynski et al.</td>
<td>N=1.894 working respondents aged 18-60 (women), 18-65 (men)</td>
<td>- job conditions, socio-occupational position</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- prestige of occupations</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- household (income, furnishings, financial difficulties)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- party and trade union affiliation</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- perception of privileged groups, attitudes towards egalitarianism and actual and just distribution of goods</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- political attitudes</td>
</tr>
<tr>
<td>Survey</td>
<td>Year</td>
<td>Authors</td>
<td>Sample</td>
<td>Main Topics</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-----------</td>
<td>-----------------------------------</td>
<td>---------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Social Structure</strong></td>
<td>1988</td>
<td>K. M. Slomczynski et al.</td>
<td>N=5.888</td>
<td>job conditions, socio-occupational position</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>age of respondents - 18-65</td>
<td>household (income, furnishings, financial difficulties)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>who helps whom</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>social contacts</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>family history</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>party and trade union affiliation</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>perception of privileged groups, attitudes towards egalitarianism and actual and just distribution of goods</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>voting behaviour</td>
</tr>
<tr>
<td><strong>Social Structure and Personality</strong></td>
<td>1992</td>
<td>K. M. Slomczynski et al.</td>
<td>N=2.288 urban sample</td>
<td>job conditions, socio-occupational position</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>age of respondents - 21-65</td>
<td>household (income, furnishings, financial difficulties)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>personality threats and psychological functioning</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>voting behaviour</td>
</tr>
<tr>
<td></td>
<td>panel study</td>
<td></td>
<td>age of respondents - 21-65</td>
<td>household (income, furnishings, financial difficulties)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>social contacts</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>opinion on privatisation, market and systemic change</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>perception of privileged groups, attitudes towards egalitarianism, actual and just distribution of goods</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>voting behaviour</td>
</tr>
</tbody>
</table>
Appendix 2

Sequences of Questions Relevant to the Indicators of Economic Well-Being

Q01. Let’s talk about your household. What is the living space of the flat/house you live in?

Q02 A. How many rooms (including kitchen) is there in your flat/house?

Q02 B. Is it your own flat/house (Are you a proprietor of this flat/house)?

Q02 C. How many people (including you) live in this flat/house?
   (if R lives alone -> Q03 B)

Q02 D. Do all these people manage the household in common, i.e. participate in covering the costs of keeping this household.?
   (Yes -> Q03)

Q02 E. How many of them maintain themselves separately, e.g. don’t participate in covering these costs?
   (if R manages household alone Q03 -> B)

Q03. What is the total income of all the people managing this household? Please, consider all kind of income and give average income (without tax) of the last 4 months?

Q03 A. How many of them have any paid job?

Q03 B. What was your average income during the last 4 months (without tax), if you consider all kind of income?

Q03 C. Please, estimate how much money do you need monthly to cover all indispensable expenses in your household?

Q03 D. And how much money is necessary to ensure the living standard that is satisfying for you?

Q04. Which of the equipment listed below was bought in your household after 1990:
   A. colour TV,
   B. radio, tape recorder, CD.-player, etc.
   C. computer
   D. washing machine

Q04 E. How much did you spend on electronic equipment and furnishings etc. during the last 5 years?

Q04 F. Do you have a family car?
   (No -> Q04 H)
Q04 G. How much is this car/are these cars worth?

Q04 H. Do you have a phone (also cell phone)?

Q04 I. How much do you pay monthly (average) for phone bills?

Q05. Do you recognise the financial condition of your household:
    1) well,
    2) rather well,
    3) rather bad, or
    4) very bad.
    (8) don’t know

Q06. Would you say that during the last ten years the financial condition of your household:
    1) changed for the better considerably,
    2) changed rather for the better,
    3) didn’t change either for the better or for the worse,
    4) changed rather for the worse, or
    5) changed for the worse considerably.
    (8) don’t know

Q07. Do you expect that in the next ten years the financial condition of your household:
    1) will be considerably better than it is now,
    2) will be a little better than it is now,
    3) will be the same that it is now,
    4) will be a little worse than it is now,
    5) will be considerably worse than it is now.
    (8) don’t know

Q08. Imagine that there is something you would like to have very much but you must pay 400,00 polish zlotys to get it. Could you make an effort to obtain such a sum during one week?

Q08 A. And if it would be much more higher sum of money, e.g. 3.000,00 polish zlotys?

Q08 B. And what if it were 800,00 polish zlotys?

Q08 C. And if it were 10.000,00 polish zlotys?

Q08 D. And if it were 200,00 polish zlotys?

Q08 E. And if it were 100,00 polish zlotys?

Q08 F. Imagine that you have been given or have won the sum of 2.000 polish zlotys. What would you do with this money? Would you:
    1) pay it to the bank or invest,
    2) buy yourself something useful or
    3) spent it on pleasure?
Q08 G. What would you prefer to do with this money most preferably?

Q09. Did it happen in your household during the last 12 months that because of the lack of money you were not able to buy/pay for:
(Answers to choose: 1- never, 2-seldom, 3- often, 4-always)

A. rent, gas and electricity bills etc.,

AA. What is your average monthly total cost of rent, gas and electricity?

B. food,
C. necessary clothes,
D. personal hygiene, house cleaning, laundry,
E. necessary repairs and renovations, paint of the flat/house,
F. medicines and medical services,
G. learning, getting qualifications, handbooks etc.
H. culture and entertainment - books, newspapers, cinema, cafe and restaurants

HH. How much does your family spent monthly on keeping the household (excluding rent, gas, electricity etc. bills).?

I. leisure activities, including holidays,

II. How much was spent in your household (from the beginning of this year till now) on tourist, travels etc.?

Q10. Imagine that you must depart for two days because of some important business. Would you:
1. go to the restaurant for a dinner or
2. eat a cheaper meal, e.g. in bar, bought in a shop or taken from home?
(Yes -> Q10 E)

Q10 A. Would you be able to pay for a night in a hotel during such a trip?

Q10 B. And would you be able to pay for several (3-4) nights in a hotel?

Q10 C. And what is your situation now, can you take a few days holiday?

Q10 D. And if you could do it, would you be able to pay for a few days holiday for yourself and 2-3 other people accompanying you?

Q10 E How many times a week do you have a nutritious, tasty meal?
[............] number of days; if more than 7=7

Q10 F. At present people often complain about not having time for themselves - for sleeping long enough, taking a rest, preparing and having a meal in proper time. And what
Q10 G. How many times a week does it happen?

**Sequences of Questions Relevant to the Indicators of Psychological Well-Being**

*Approval of novelty*
J30. It is the best to follow proved and accepted ways of doing things.
J33. Do you believe you are (a) a person who thinks about new goals and ways of doing things for the future, or (b) somebody who is not particularly concerned about the future?
J03. I believe that in general change is worse than no change at all.
J07. People who question the proved and accepted ways of doing things usually end up causing trouble.

*Trustfulness*
J34. Do you think most people can be trusted?
J29. If you do not watch out, people take advantage of you.
J01. When you are in serious trouble, no one cares what happens to you.
J42. In contact with other people, how often are you completely surprised by their actions?
J20. By nature, people tend to be co-operative.

*Self-esteem (two-dimensional : self-confidence and self-deprecation)*
J11. I generally have a favourable opinion about myself and my abilities.
J19. I feel that as a person I am as worthy as others.
J21. I am able to do most things I care about as well as other people can.
J09. I generally have confidence that when I make plans I will be able to carry them out.
J18. Once I have made up my mind, I try hard not to change it.
J06. I feel useless at times.
J25. At times I think I am not good at all.
J27. There are very few things about which I am absolutely certain.
J15. I wish I could have a better opinion about myself.

*Anxiety*
J50. How often do you feel so crushed that you cannot gather your thoughts?
J49. How often do you feel depressed?
J41. How frequently do you feel anxious for no apparent reason?
J52. How often do you feel uneasy about something without knowing why?
J47. How often do you feel so restless that you cannot sit still?
J40. How often do you find that you cannot get rid of some obsessive thoughts?
J45. How often do you feel bored with everything?
J46. How often do you feel powerless to get something you want particularly strongly?
J48. How often do you feel that the world is not understandable?
J39. How often do you feel there is not much purpose to being alive?
Appendix 3

Index of Political Participation

Influence of society on government decisions is one of the important indicators of broadly understood well-being. The presented index of political participation measures individual involvement in actions which are aimed at influencing the composition and policy of political elites. Questions given above concern participation in different kind of protest and conventional activities both on the local and central level.

Scale of conventional political participation

1. People act differently to influence local and central government decisions. I am listing different types of such activities. Have you in the last 10 years participated in any of these activities. If yes, did it happen once or several times?

<table>
<thead>
<tr>
<th>Activity</th>
<th>Yes, once</th>
<th>Yes, several times</th>
<th>No</th>
<th>Hard to say, don’t remember</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. convincing others to give their vote to your favourite party or candidate</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B. taking part in meetings with politicians or candidates to Parliament?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C. contacting personally, by letter or by phone a member of Parliament or a government officer to arrange any important matter</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D. contacting personally, by letter or by phone representatives of local authorities to influence their decisions in any important matter</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>E. co-operating with others from your neighbourhood to arrange any local problem</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>F. working in the Parliamentary election campaign for any party or candidate</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>G. joining a political party or any other political organisation</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: question inspired by the questions worked out by: Verba and Nie 1972, Mason 1995, Barnes, Kaase 1979.

2. Did you vote in the Parliamentary election in ....... ?
3. Did you vote in the local election in ....... ?
4. Did you vote in the Presidential election in ....... ?
5. Do you belong to a trade union? If yes, are you an active member, i.e. you participate regularly in union meetings and other activities?

[1) no; 2) yes, but I am not an active member; 3) yes, I am an active member]
1. In different countries people protest against what they do not agree with in different ways. Did you participate in any kind of protest action given below during the last 10 years? If yes, did it happen once or several times?

<table>
<thead>
<tr>
<th>Activity</th>
<th>Yes, once</th>
<th>Yes, several times</th>
<th>No</th>
<th>Hard to say/don’t remember</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. collecting signatures under petitions and protests</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B. boycotting governmental decisions;</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C. street demonstrations;</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D. strikes;</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>E. pasting posters</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>F. occupying public buildings;</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>G. Resisting the Policy</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: question inspired by scale of contest potential by Barnes and Kaase 1979; similar question was used in research “Poles”.
Bibliography


40. Szczepanski, J.: Approaches to the Model Construction and Realization of the Patterns of Socialist Consumption. Warsaw: IFiS Publisher 1978