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dr hab. Barbara Danowska-Prokop, prof. UE[1]
Department of Economics
University of Economics in Katowice

dr hab. Iwona Pawlas, prof. UE[2]
Department of International Economic Relations
University of Economics in Katowice

dr hab. Małgorzata Czornik, prof. UE[3]
Department of Strategic and Regional Studies
University of Economics in Katowice

Poverty in Polish regions in the light of European Union policy

Introduction

In the 1970s, cracks appeared in the "ideal image" of the economies of highly industrialised countries, i.e. the Keynesian-social-democratic compromise between labour and capital, and market and state. During the period in question, two unfavourable economic phenomena became apparent: a slowdown in economic growth and the deepening of inequality in both economic (income and property) and social (prestige and social position) dimensions. At this point, it should be mentioned that the slowdown in economic growth and the deterioration of economic and social relations followed two oil shocks (the first in 1973–1974 and the second in 1978–1979). Both shocks set in motion a mechanism for increased production costs, which forced a change in the relationship between capital and labour, and confirmed the weakness of economic policy in the Keynesian spirit.

[1] Correspondence address: 1 Maja 50, 40-287 Katowice; +48 32 257 72 64; e-mail: barbara.danowska-prokop@ue.katowice.pl. ORCID: 0000-0002-5030-9220.

[2] Correspondence address: 1 Maja 50, 40-287 Katowice; +48 32 257 78 54; e-mail: iwona.pawlas@ue.katowice.pl. ORCID: 0000-0001-8285-8905.

[3] Correspondence address: 1 Maja 50, 40-287 Katowice; +48 32 257 74 15; e-mail: malgorzata.czornik@ue.katowice.pl. ORCID: 0000-0001-5841-3367.

Both phenomena have an impact not only on the dynamics of economic life, i.e. on production/national income, employment and inflation, but also on the level of social life, i.e. on social relations and the growth of antagonisms (Autor, Levy, Murmane, 2003, pp. 1279–1333; Cameron, Neal, 2004, pp. 401–403; Dziewięcka-Bokun, 1999, pp. 70–73; Jones, 2002, pp. 597–599, 669–673; Morgenson, 2011, pp. 235–236; Raval, 2018, pp. 93–119; Skodlarski, 2014, pp. 363–368).

The final "bankruptcy" of economic policy in the Keynesian-social-democratic spirit forces the expansion of private capital, which in turn contributes to the reorientation of the economic system, as well as the gradual reduction of state activity in both the real and social spheres (budget spending on social purposes, i.e. on payment transfers and especially on education, was commonly reduced). The mechanisms set in motion at that time prepared the ground for the liberal revolution of the late 1980s and early 1990s (especially in the United States and the United Kingdom), which fostered the process of globalisation and the internationalisation of businesses. "The Keynesian revolution has collapsed. In the history of economics, the era of John Maynard Keynes has given way to the era of Milton Friedman." (Galbraith, 1991, p. 288). Supporters of the liberal outlook – including Milton Friedman, Friedrich Hayek, Arthur Laffer or Robert Lucas – speaking of freeing the market and marginalising the economic powers of the state, approve of the diversity in the economic and social dimensions and, therefore, glorify freedom in the economic sense and accept income and wealth differentiation of the economic society (Easterling, 2014, pp. 15–67; Gill, 2002, pp. 47–65; Godłów-Legiędź, 1992, pp. 25–29; Poverty, Shared, 2021, pp. 2–5).

One of the economic goals of the European Union is economic development. References to the issues of equalising disparities, promoting development and reducing poverty are found in many documents regulating the activities of the European Union, from the treaties to strategies and assumptions of EU policies. Successive enlargements of the EU have resulted in a considerable increase in development disparities in the EU and forced the creation of policies dedicated to reducing inequalities between countries and EU regions. The 21st century brought many new challenges and threats to the EU (the 2008+ global financial crisis, the COVID-19 pandemic, Russia's aggression against Ukraine and the related energy and food crisis, as well as the migrant/refugee crisis), which led to a further increase in disparities and forced the EU to take appropriate countermeasures.

The theoretical and cognitive aim of the paper is to present the differentiated perception of the problem of poverty in economic theory and EU policy decisions. The purpose of the empirical study is to identify and evaluate regional disparities in poverty using the example of Poland's regions (provinces).

The rationale for the differential wealth of their inhabitants is based on historical policy decisions, infrastructural backwardness, proximity to foreign markets, and current economic development conditions. The activities of businesses and the attractiveness of the labour market in some regions are further enhanced by the existence of a large city with metropolitan ambitions, which attracts resources and concentrates competitive service activities.

Method

The research was conducted with the application of the following methods: literature studies, descriptive and comparative analysis, and critical thinking. Due to the complexity of the category of poverty and poverty conditions, the selected method of multivariate comparative analysis, i.e. TMD, introduced by Hellwig in 1968, was adopted. The application of TMD made it possible to make a hierarchy of the analysed subjects – i.e. Polish regions /voivodeships – in terms of poverty measured by the synthetic index, as well as in terms of poverty conditions measured by the synthetic index. For the purpose of taxonomic analysis, four diagnostic variables were used to determine the poverty level, and sixteen diagnostic variables were taken into consideration to determine the poverty conditions. As a result of the operationalisation, the decision was made to take into consideration the following indices in the research process:

1. Poverty:
   – Average monthly income from social benefits per capita (stimulant);
   – Average monthly available income per capita (stimulant);
   – Poverty coverage rate after including social transfers in % (destimulant);
   – Monetary social assistance per capita (destimulant);
2. Regional conditions:
   a) Economic conditions
      – GDP per capita (stimulant);
      – Province budget expenditure per capita (stimulant);
      – Gross value added per employed person (stimulant);
      – Entities of the national economy per 1000 population (stimulant);
      – Investment outlays per inhabitant (stimulant);
   b) Labour market conditions
      – Unemployment rate (in %) (destimulant);
      – Number of employed persons per 1000 population (stimulant);
      – Employed in agriculture as % of total employment (destimulant);
      – Natural persons conducting economic activity per 10,000 population (stimulant);
   c) Infrastructure conditions
      – Expressways and motorways per 1000 square kilometres (stimulant);
      – Share of hard surface public roads (stimulant);
      – Railway lines per 1000 square kilometres (stimulant);

– Digital subscriber lines per 1000 population (stimulant);
– Population per 1 bed in hospitals (stimulant)
– Outlays on fixed assets in environmental protection and water management per capita (stimulant);
– Higher education students per 10,000 population (stimulant).

After selecting the set of diagnostic variables, the character of each variable was determined. The majority of variables were considered stimulants. Four variables were treated as destimulants. Variables were standardised, and a development model was constructed – a model unit, where diagnostic variables were determined according to the rule where: $z_{0j} = \max_i (z_{ij})$ for stimulants or $z_{0j} = \min_i (z_{ij})$ for destimulants. The distance of i-unit from the development model was calculated using Euclid's measure:

$$d_{oi} = \sqrt{\sum_{j=1}^{m} (z_{ij} - z_{oj})^2}$$

TMD was calculated according to the formula (Hellwig, 1968; Pluta, 1986; Nowak, 1990):

TMDi= $1 - \frac{d_{oi}}{d_o}$, i=1, 2, ... n, where: $d_0 = \bar{d}_o + 2S_0$, and:

$\bar{d}_0 = \frac{1}{n}\sum_{i=1}^{n} d_{oi}$, $S_0 = \sqrt{\frac{1}{n}\sum_{i=1}^{n}(d_{oi} - \bar{d}_o)^2}$, while: TMD$i \in [0; 1]$, for i=1, 2, ... n.

Poland's provinces were analysed according to the level of poverty expressed by a synthetic index TMD (P), and in regard to regional conditions TMD (R). When it comes to regional conditions, three sub-indices were identified and calculated: economic conditions (RE), labour market conditions (RLM) and infrastructure conditions (RI). Finally, the super-index combining the two synthetic indices was calculated as TMD (PR).

Moreover, the application of cluster analysis for the research resulted in the grouping of the analysed subjects – sixteen Polish provinces – in four clusters according to the level of the super-index combining the two synthetic indices. A selected method of grouping linearly ordered objects, namely the method of standard deviations, was used for this purpose. Sixteen Polish provinces were divided into four groups (classes), according to the following rules (Pawlas, 2018b):

$$G_1 : s_i < \bar{s} - S(s),$$

$$G_2 : \bar{s} > s_i \geq s_i - S(s),$$

$$G_3 : \bar{s} + S(s) > s_i \geq \bar{s},$$

$$G_4 : s_i \geq \bar{s} + S(s),$$

where: $\bar{s}$ – arithmetic mean of the synthetic variable (in this study: arithmetic mean of TMD), while *S(s)* – standard deviation of the synthetic variable (in this study: standard deviation of TMD), s_i – value of the synthetic variable of the object *i* (in this study: TMD value in *i* for Polish provinces).

A dual approach to poverty in modern economic theory – Literature review

The dual approach to the problem of poverty and inequality in modern economic theory stems from advocating either a demand- or supply-side view of the economic process, and thus from a different interpretation of the relationship between the state and the market, and thus between capital and labour, and the rich and the poor. The liberal revolution perpetuates neoliberal models of social and economic development (it carries over the neoclassical model of capital accumulation), and thus the assumptions of neoliberal economic policy, especially the principles of individualism, market self-regulation and innovation. The principle of individual benefit, while guaranteeing the conditions of economic optimisation and social mobility (widely opening the paths of economic and social advancement), automatically limits the state's activity in the field of tax and social policy, and thus rationalises access to socially desirable goods, i.e. public goods. In the new systemic realities, the role of the state in the economic sphere is limited to protecting the conditions of freedom of action, and in the social sphere to the sham of protecting the poor and those affected by misfortune, including the initiation of ineffective measures in education and health care. Economic policy in the liberal spirit, while preferring economic freedom, accepts, on the one hand, the desire of the rich to get richer – to increase the rate of profits earned, and, on the other hand, the deterioration of working conditions and wages, and the growth of income and property (capital) inequality in both national and international relations (Levy, Murmane, 2003, pp. 1279–1333; Cole, 2008, p. 247; Friedman, 1993, pp. 160–161, 182–183; Neal, Rick, 2014, pp. 1–54; Nielsen, 2018, pp. 175–197).

The liberal revolution sets in motion a mechanism to displace the state not only from the real and regulatory sphere, but also from the social sphere. Thanks to this, the effect of "hollow" public finances is revealed, which sets in motion a process of gradual privatisation of public services (especially in the United States) and contributes not only to an increase in their prices and a decrease in the wages of lower-level public sector employees, but also to a deterioration in the quality of goods offered and social services provided. Therefore, in domestic relations, the gap between the rich and the poor, between capital and labour, between super-managers and employees is steadily widening, as the growing national income goes primarily to the richest, to the super-managers, and at the same time, the number of homeless and working people living in extreme poverty is growing: „… people having only their own labour often live in modest or even very modest conditions, … capital holders can, without working, appropriate a significant portion of the goods produced" (Piketty, 2015, p. 57).

Neoliberals reject the ideal of a fair (equal) distribution of national income – while approving the market mechanism of allocating scarce resources – in order to reduce the level of economic inequality and activate society to work. According to them, top-down imposed social insurance becomes a tool of random redistribution and thus threatens the natural creativity of the market system. Following this line of reasoning, they believe that physical capital combined with properly educated human capital, guarantees in parallel the expansion of the value of investments and high productivity of the economy, and thus reduces the level of poverty and inequality (Milanowic, 2018, pp. 269–294).

Proponents of the demand-populist view of the economic process (in the theoretical layer referring to Keynesianism, but in reality aiming to limit freedom to power and action), including Thomas Piketty[4] and Anthony B. Atkinson[5], rejecting the neoclassical model of capital accumulation and the assumption of market reliability, offer a different attitude to the problem of deepening economic inequality, and therefore of progressive economic and social insecurity. According to them, a higher rate of return on capital increases the rate of capitalisation of already existing wealth, and thus exacerbates not only primary wealth and income inequalities, but also disparities in the conditions of wealth distribution nationally and internationally (Piketty, 2015, pp. 36–37; Solow, 2018, pp. 67–78).

Analysing the economic inequality problem, they focus their attention primarily on the growing disparities in highly industrialised countries. The abovementioned problem is particularly acutely felt in the United States, where the ratio of wealth to annual national income is at a very high level. In this country, the fastest growing disparities are observed not only in the distribution of wealth, but especially in the distribution of national income between capital and labour; there

[4] In 2014, the French economist T. Piketty published a paper: "Capital in the 21st Century," which is a result of his longtime historical-economic and socio-political research into the causes of economic inequality, as confirmed by his previous publications, including: (Piketty, 2003; Piketty, Saez, 2003; Atkinson, Piketty (eds.), 2007; Atkinson, Piketty (eds.), 2010; Atkinson, Piketty, Saez, 2011).

[5] Anthony B. Atkinson has made a name for himself with his research into issues of inequality and poverty, as well as income distribution. His research has resulted in numerous book publications and papers in academic journals, including: (Atkinson, 1993; Atkinson, 1998; Atkinson, 2008; Atkinson, Piketty (eds.), 2010; Atkinson, 2014; Atkinson, 2017).

is even talk of an erosion of the minimum wage and the growth of income poverty among the employed: "Average wages in developed countries have been stagnant for three decades, a tendency that is likely to continue in the future" (Standing, 2021, p. 85). Similar trends are also revealed in other countries belonging to this group. However, in their case, the ratio of wealth to annual national income is at a correspondingly lower level, and therefore less disparity is observed in the distribution of wealth, and, therefore, national income (Goldhammer, 2018, pp. 49–56; Naidu, 2018, pp. 128–148; Nielsen, 2018, pp. 175–197; Piketty, 2015, pp. 202–289; Raczkowska, 2014, pp. 319–327).

Representatives of the demand-populist approach, following this line of reasoning further, state that the process of growing economic inequality is a consequence of the reduction of the effective rate of taxation of the richest, which contributes to the dominance of the share of capital in national income, because under conditions of predominance of the rate of return on capital over the rate of economic growth, there is not only a slowdown in the rate of economic growth, but also a systematic widening of the gap between the two rates, which inevitably leads to a growing disparity in labour income, even to the degradation of labour (except for very high-level managers, the effect of increasing inequality in the upper distribution of labour income distribution), and the transformation of both the labour market and the capital market (Atkinson, 2017, pp. 2–36, 123–137, 249–260; Atkinson, 1998, pp. 1–20; Piketty, 2012a, pp. 18–21; Piketty, 2012b, pp. 22–25; Piketty, 2013a, pp. 61–63; Piketty, 2013b, pp. 74–76; Piketty, 2014, pp. 95–97; Piketty, 2015, pp. 586–725). Deepening inequality results in accelerating the process of social polarisation and chaos, i.e. widening the gap between the rich (including the super-rich) and the ever-poor 'wage earners', i.e. between the top 1 percent of the richest and the rest of society, both nationally and internationally. "Before World War I, the top 1 percent of the richest received about one-fifth of the total income in both the UK and the US. By 1950, that percentage was more than half as much, but since 1980, the 1 percent's share of national income has begun to rise again. In the United States, the percentage has returned to the level of 100 years ago" (Krugman, 2018, p. 80).

According to representatives of the demand-populist approach, the inefficiency and failure of the market forces state interference both in the real sphere and, above all, in the social sphere, i.e. in the conditions for the operation of economic agents (in the conditions for the functioning of the economy), as well as in the conditions for the redistribution of the national income produced. Therefore, they propose new optics for looking at the state, referring to the 20th-century concept of the social state. According to this concept, the state, while pursuing an active economic and social policy, determines, on the one hand, the tax strategy and, on the other hand, the principles of redistribution of the produced national income and thus reduces the level of economic inequality (in income as well as property/capital terms). Therefore, the state should initiate measures to regain control over the rate of wealth accumulation in the new economic and social, and political realities (the rate of concentration of capitalisation) through changes in the tax policy already implemented (through the introduction of simple and transparent taxes), especially in relation to the richest (1 percent and especially 0.1 percent), as well as income policy and redistributive policy (Atkinson, 2017, pp. 204–211, 297–352; Belka, 1986, pp. 42–48; Mazzucato, 2016, pp. 139–146; Piketty, 2013, pp. 74–76; Piketty, 2014, pp. 95–97; Piketty, 2015, pp. 681–689; 724–725).

Poverty as a socio-economic category

Poverty is a multidimensional phenomenon, extremely problematic to define as the literature uses such terms as poverty, deprivation, critical living situation or social disadvantage interchangeably. In the above context, the phenomenon of poverty has both quantitative and qualitative aspects, but also temporal and spatial ones. Therefore, the difficulty of clearly defining the criterion of poverty arises (Dziewięcka-Bokun, Mielecki, 1998, p. 112; Ravallion, Chen, 2003, pp. 93–99; Sen, 1976, pp. 219–231). In the broadly interpreted social sciences, poverty is defined as:

- “Income insufficient to pay for basic supplies of food, clothing, a roof over your head and other necessities” (Samuelsson, Nordhaus, 2014, p. 333);
- “A state of relatively permanent unsatisfaction of basic human needs” (Sztaba, ed., 2007, p. 483);
- “A phenomenon dysfunctional for the social system” (Sztumski, 1995, pp. 13–18);
- “A situation in which an individual (person, family, household) does not have sufficient resources – (both monetary resources in the form of current income and income from previous periods and in the form of accumulated material resources) to meet its needs” (Panek, 2001, p. 162).

To sum up, poverty definitions, from the point of view of the social sciences, are created taking into account the economic, as well as social, cultural and political dimensions of the phenomenon of poverty.

The European Union’s approach to the problem of poverty and disparities

One of the economic objectives of the European Union is regionally balanced economic development. The issue of economic development was put at the centre of integration processes initiated by the European Communities in the 1950s

(Moussis, 2015; Olsen, 2021). Statements regarding economic development have been included in the Treaties. Article 2 of the Treaty of Rome establishing the European Economic Community stated: “The Community shall have as its task… to promote throughout the Community a harmonious development of economic activities, a continuous and balanced expansion, an increase in stability, an accelerated raising of the standard of living…” (The Treaty of Rome (1957), Article 2). The Single European Act of 1986 focused on the problem of considerable disparities in socioeconomic development observed in the mid-1980s. In Title V, Economic and Social Cohesion, in Article 130 A, one can read: “In order to promote its overall harmonious development, the Community shall develop and pursue its actions leading to the strengthening of its economic and social cohesion. In particular, the Community shall aim at reducing disparities between the various regions and the backwardness of the least-favoured regions”. Moreover, Article 130 B states: “The Community shall support the achievement of these objectives by the action it takes through the Structural Funds (European Agricultural Guidance and Guarantee Fund, Guidance Section, European Social Fund, European Regional Development Fund), the European Investment Bank and the other existing financial instruments”, while in Article 130 C the importance of the European Regional Development Fund in the process of disparities reduction is stressed: “The European Regional Development fund is intended to help redress the principal regional imbalances in the Community through participating in the development and structural adjustment of regions whose development is lagging behind and in the conversion of declining industrial regions.” The significance of “the economic and social development of the Community as a whole and the balanced development of its regions” is underlined again in Article 130 Q. (Single European Act, 1987). The Treaty on European Union concluded in Maastricht in 1992 and introduced a new version of Article 2, in which a stronger emphasis is put on economic development. One can read there: “The Community shall have as its task, by establishing a common market and an economic and monetary union and by implementing the common policies or activities referred to in Articles 3 and 3a, to promote throughout the Community a harmonious and balanced development of economic activities, sustainable and non-inflationary growth respecting the environment, a high degree of convergence of economic performance, a high level of employment and of social protection, the raising of the standard of living and quality of life, and economic and social cohesion and solidarity among Member States ” (Treaty on European Union, 1992). In addition to that, Article 103 states that “In order to ensure sustained convergence of the economic performances of the Member States, the Council shall, on the basis of reports submitted by the Commission, monitor economic developments in each of the Member States and in the Community as well as the consistency of economic policies with the broad guidelines … and regularly carry out an overall assessment" (Treaty on European Union, 1992). The Amsterdam Treaty adopted in 1997 further strengthens the importance of balanced growth and development: Part 1 Substantive Amendments, Article 1, point 2 relates to the amendment of the Treaty on European Union, concerning the issue of development as an overall objective of the EU: "Determined to promote economic and social progress for their peoples, taking into account the principle of sustainable development and within the context of the accomplishment of the internal market and of reinforced cohesion and environmental protection, and to implement policies ensuring that advances in economic integration are accompanied by parallel progress in other fields"; what is more, point 5 formulates the following construction of an objective of the EU: "to promote economic and social progress and a high level of employment and to achieve balanced and sustainable development, in particular through the creation of an area without internal frontiers, through the strengthening of economic and social cohesion and through the establishment of economic and monetary union, ultimately including a single currency" (Treaty of Amsterdam, 1997). The Treaty of Lisbon, in Article 2 of the Treaty on European Union, states: "The EU… shall work for the sustainable development of Europe based on balanced economic growth and price stability, a highly competitive social market economy, aiming at full employment and social progress, and a high level of protection and improvement of the quality of the environment. It shall promote scientific and technological advances. It shall combat social exclusion and discrimination… It shall promote economic, social and territorial cohesion…". The Treaty of Lisbon also added an amendment to Article 163; according to the aforementioned amendment, Article 163 took the following form: "The Union shall have the objective of strengthening its scientific and technological bases by achieving a European research area in which researchers, scientific knowledge and technology circulate freely, and encouraging it to become more competitive, including in its industry, while promoting all the research activities deemed necessary virtue of other Chapters of the Treaties" (Treaty of Lisbon, 2007).

The significance of the promotion and stimulation of regionally balanced economic development was strengthened with both Southern enlargements (of 1981 and 1986) and Eastern enlargements (of 2004, 2007, 2013). The enlargements mentioned above resulted in widening the gap between the rich and the poor Member States (Pawlas, 2018a). The European Union actively responded to the identified challenge of regionally balanced growth and development. One should mention the introduction of new policies, instruments and actions devoted to the promotion of regionally balanced economic development. The promotion of regionally balanced economic development was at the centre of the Common Regional Policy introduced in 1988 (Dall'Erba, 2003; Hübner, 2008), which was later transformed into the EU Policy of Economic, Social and Territorial Cohesion (Rodokanakis 2006; McCann and Ortega-Argiles, 2013).

The first decade of the 21st century brought further strengthening of the development objective of the European Union. The Lisbon Strategy of 2000 was a development plan for the economy of the European Union for the 1st decade of the 21st century. With the adoption of the Lisbon Strategy, the European Union made an attempt to meet the challenges resulting from both globalisation processes and the emergence of a knowledge-driven economy. The main objective of the Lisbon Strategy was to transform the European Union into the most competitive and dynamic knowledge-based economy in the world, and to solve the problem of low productivity and stagnation of economic growth in the European Union. Initially, the Lisbon Strategy was based on two pillars: economic and social. In 2001, however, a decision was made to introduce the third pillar, i.e. the environmental dimension. Unfortunately, the ambitious goals of the Lisbon Strategy were not met (European Council, 2000; European Commission, 2007; Krcek, 2013).

The problem of rising disparities in development and uneven distribution of wealth was further strengthened by the global financial crisis. The European Union took it into consideration in the Europe 2020 Strategy, which was adopted in 2010 for the period 2010–2020. The Europe 2020 Strategy consisted of three priorities, namely: 1. Smart Growth, 2. Sustainable Growth, 3. Inclusive Growth. The Inclusive Growth priority fully corresponded with the issue of poverty and social exclusion. It aimed at promoting more balanced growth and development, which should eventually lead to the reduction of poverty and social exclusion. The EU listed three measurable targets within this priority: reducing the number of people living below the poverty line by 20 million, increasing the employment rate of people aged 20–64 years up to 75%, reducing the school drop-out rate to 10% and increasing tertiary education up to 40% by the year 2020. Hence, education and activity in the labour market were considered crucial determinants of poverty reduction and pro-inclusive factors of development by the EU (European Commission, 2010; European Commission, 2019). In 2019, the EU adopted further strategic documents stressing the need for a reduction in poverty and exclusion and further promotion of inclusion: A New Strategic Agenda 2019–2024 (European Council, 2019) and Sibiu Declaration (Council of the EU, 2019). EU leaders emphasised the vital need to prevent the further deepening of intergenerational, territorial and educational divisions, to ensure equal opportunities and adequate social protection, as well as to reduce poverty and social exclusion.

The COVID-19 pandemic resulted in new challenges for the EU and created new areas of poverty and exclusion in the EU Member States (Schramm, 2022). The first reaction of the EU was the document "A Roadmap for Recovery.

Towards a More Resilient, Sustainable and Fair Europe", adopted in April 2020. The European Council called for a coordinated exit strategy, a comprehensive recovery plan and unprecedented investment. The need for a recovery plan based on solidarity, cohesion and convergence was stressed. A fully functioning and revitalised Single Market was to be a key component of the EU's future prosperity and resilience. To achieve this goal, the Green Transition and the Digital Transformation would be prioritised as tools for the modernisation of the EU's economy. Moreover, the strategic autonomy of the EU would have to be achieved through a new industrial policy (European Council, 2020).

The next crucial step was the adoption of the Multiannual Financial Framework 2021–2027 (MFF 2021–2027) and the Next Generation EU (NGEU) (Alcidi, Gros, 2020; European Commission 2022). MFF 2021–2027 accounts for EUR 1074 billion (in 2018 prices), while the NGEU amounts to EUR 750 billion (in 2018 prices). The Next Generation EU is a temporary instrument planned for the period 2021–2026. The main objective of the NGEU is to speed up the post-pandemic recovery and to strengthen resilience to future crises. Its main element is the Recovery and Resilience Facility (RRF), amounting to EUR 672.5 billion (in 2018 prices), which consists of two separate items: grants (amounting to EUR 312.5 billion in 2018 prices) and loans (amounting to EUR 360 billion in 2018 prices). RRF came into operation in February 2021. Other NGEU financial sources are to be devoted to: REACT-EU (EUR 47.5 billion in 2018 prices), Rural areas development (EUR 7.5 billion in 2018 prices), Just Transition Fund (EUR 10.0 billion in 2018 prices), Invest EU (EUR 5.6 billion in 2018 prices), RescEU (EUR 1.9 billion in 2018 prices) and Horizon Europe (EUR 5.0 billion in 2018 prices) (European Commission 2020; European Commission, 2021).

The energy crisis, as well as the Russian military aggression on Ukraine, plus the EU sanctions, create yet another challenge for the EU. A confluence of interconnected factors may result in further expansion of poverty in the EU and a further rise in regional disparities (Popkostova, 2022). The European Commission proposed the introduction of a new action, namely REPowerEU: Joint European action for more affordable, secure and sustainable energy. This plan of the European Commission outlines a series of measures to respond to rising energy prices in Europe and to replenish gas stocks for next winter (European Commission, 2022). Obviously, it is far too soon to describe the details of this planned action or to analyse the likelihood of its adoption. Undoubtedly, the situation is that the world economy is becoming more and more unstable and dynamic. The EU will have to take further steps and actions to keep its role in Europe and in a global environment. The strength and position of the EU will determine its capability of counteracting poverty and disparities in development in the EU (European Central Bank, 2022).

Multidimensional analysis of poverty in Polish regions

Poverty in Poland is not an evenly distributed phenomenon. The administrative division of the country into 16 provinces is, in economic terms, a division into the generally poorer Eastern Poland, the agricultural areas of Central Poland with its dominant rich regional capitals, the wealth-differentiated Pomerania in northern Poland and the urbanised and industrialised Southern Poland. Differences in wealth are influenced by historical backgrounds dating back to the Partitions (1795–1918).

The Polish territories incorporated into the Kingdom of Prussia in the 19^{th} century developed better primarily due to investments in infrastructure, including railroads, education and health care. The situation was somewhat worse in the regions administered by the Austro-Hungarian Empire authorities, which nevertheless had access to many of the amenities spreading in Western Europe. The situation was much worse in the areas under Russian control, whose population was treated by the authorities in Saint Petersburg as inferior subjects. The contemporary distribution of economic interests is in line with both economic ties with the European Union favouring Western regions and local conditions determining the advantages of territorial units for doing business (natural resources, entrepreneurship). This is further compounded by the location of large cities being concentrations of people, resources and markets. They attract investors and consumers with their potential, creating the largest part of the wealth of their regions (Warsaw, Krakow, Wroclaw, Poznan).

Regional variation of poverty in Poland can be studied using the context of regional development. This is because the formation of the level of this phenomenon is not only the result of direct influences arising from the characteristics of employment, the level of wages, the number of enterprises or the scale of social welfare benefits, but also regional conditions, which determine the opportunities to undertake profitable economic activity conducive to building the wealth of regional residents. They consist of economic realities, labour market characteristics and functioning technical and social infrastructure. Table 1 shows indicators describing Polish regions: synthetic poverty index, synthetic indicators of regional determinants (economic, labour market and infrastructure), as well as super-index and groups (classes), calculated for the years 2010 and 2020, further illustrated in Figure 1. The analysis was conducted with the application of statistical information supplied by the Central Statistical Office (Warsaw) and taken from Statistical Yearbook of the Regions – Poland 2021, Statistical Yearbook of the Regions – Poland 2011, as well as https://bdl.stat.gov.pl/bdl/dane/podgrup/temat.

Tab. 1. Poverty in Polish provinces

Province	2010							2020						
	P	R_E	R_{LM}	R_I	R	Super index (PR)	Class	P	R_E	R_{LM}	R_I	R	Super index (PR)	Class
Lower Silesia	0.587	0.595	0.445	0.485	0.599	0.613	C4	0.598	0.476	0.476	0.601	0.566	0.705	C4
Kuyavia-Pomerania	0.409	0.392	0.372	0.191	0.359	0.449	C2	0.514	0.345	0.345	0.293	0.340	0.480	C3
Lublin	0.094	0.166	0.284	0.143	0.180	0.151	C1	0.178	0.170	0.170	0.263	0.163	0.151	C1
Lubusz	0.308	0.531	0.407	0.194	0.436	0.430	C2	0.448	0.373	0.373	0.274	0.357	0.459	C3
Lodz	0.520	0.403	0.538	0.340	0.511	0.501	C3	0.457	0.369	0.369	0.434	0.415	0.508	C3
Lesser Poland	0.326	0.374	0.558	0.335	0.499	0.475	C2	0.457	0.417	0.417	0.426	0.460	0.540	C3
Mazovia	0.619	0.903	0.871	0.335	0.827	1.000	C4	0.518	0.873	0.873	0.465	0.804	0.741	C4
Opole	0.334	0.394	0.350	0.346	0.421	0.441	C2	0.225	0.371	0.371	0.411	0.410	0.343	C2
Subcarpathia	0.171	0.272	0.228	0.187	0.232	0.257	C1	0.165	0.250	0.250	0.341	0.268	0.213	C1
Podlasie	0.292	0.223	0.282	0.143	0.209	0.365	C2	0.273	0.305	0.305	0.163	0.244	0.270	C1
Pomerania	0.493	0.502	0.550	0.270	0.536	0.546	C3	0.327	0.423	0.423	0.322	0.424	0.427	C2
Silesian	0.619	0.475	0.553	0.487	0.592	0.584	C3	0.794	0.445	0.445	0.701	0.541	0.746	C4
Holy Cross	0.215	0.340	0.266	0.274	0.324	0.259	C1	0.306	0.223	0.223	0.281	0.220	0.272	C2
Warmia-Masuria	0.428	0.310	0.275	0.126	0.324	0.413	C2	0.398	0.299	0.299	0.162	0.239	0.339	C2
Greater Poland	0.415	0.473	0.567	0.313	0.551	0.581	C3	0.380	0.492	0.492	0.280	0.462	0.489	C3
West Pomerania	0.537	0.439	0.275	0.391	0.413	0.580	C3	0.506	0.449	0.449	0.331	0.451	0.564	C3
Correlation coefficient P-R	0.8150191							0.641819						

Key:
P – Synthetic index of poverty; R – Synthetic index of regional conditions; Rg – Synthetic sub-index of regional economic conditions; Rrp – Synthetic sub-index of regional labour market conditions; Ri – Synthetic sub-index of regional infrastructure conditions; Super-index – synthetic index of poverty and regional conditions
Names of Poland's provinces: Dolnośląskie – Lower Silesia Province, Kujawsko-pomorskie - Kuyavia-Pomerania Province, Łódzkie – Lodz Province, Lubelskie – Lublin Province, Lubuskie – Lubusz Province, Małopolskie - Lesser Poland Province, Mazowieckie – Mazovia Province, Opolskie – Opole Province, Podkarpackie – Subcarpathia Province, Podlaskie – Podlasie Province, Pomorskie – Pomerania Province, Śląskie – Silesian Province, Świętokrzyskie – Świętokrzyskie (Holy Cross) Province, Warmińsko-mazurskie – Warmia-Masuria Province, Wielkopolskie – Greater Poland Province, Zachodniopomorskie – West Pomerania Province.

Source: own calculations based on statistical data taken from the Central Statistical Office (2011, 2021).

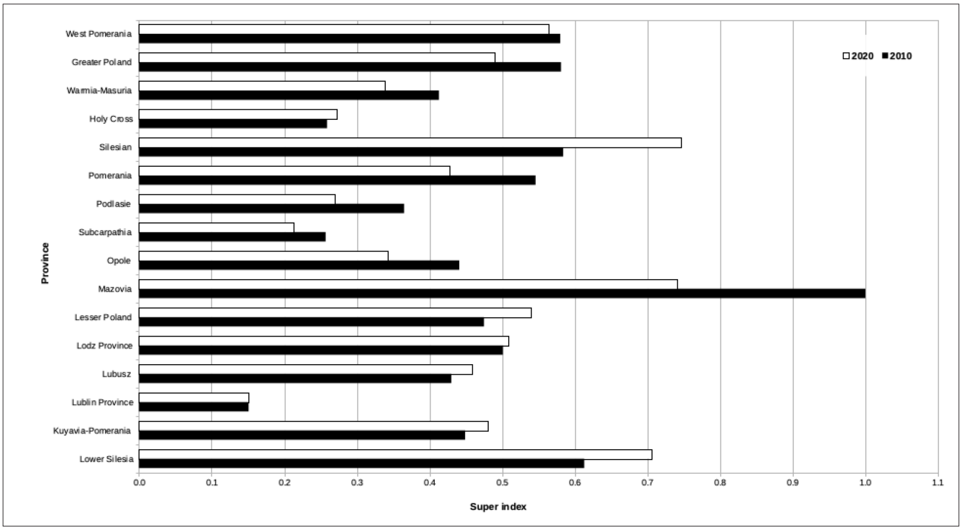

Figure 1. Poverty in Poland's provinces

Source: own calculations, own presentation.

The level of regional differentiation of the poverty phenomenon in Poland in terms of regional conditions makes it possible to distinguish four classes of regions. There were two provinces among the richest (class C4) in the years under study: Mazovia Province (Mazowieckie) and Lower Silesia Province (Dolnośląskie). They are characterised by the location of a large city (Warsaw in Mazovia Province and Wroclaw in Lower Silesia Province), which attracts people and companies, providing high wages for employees and profits for owners. They also offer many desirable jobs and good infrastructure facilities (e.g. motorways, universities, hospitals, cultural institutions). The innovative nature of the entities operating in these centres and their metropolitan aspirations are also conducive to building international investment attractiveness. The agricultural environment of the capital city of Warsaw does not hamper its economic vitality, while Wroclaw additionally benefits from the advantages of the Western region, taking advantage of its proximity to Germany. Silesian Province (Śląskie) – Poland's most urbanised region, heavily industrialised, though still struggling with difficulties of the coal mining transition – joined Class 4 in 2020. However, the area of Silesian Province is also home to a number of modern enterprises, and there are well-developed transportation networks and a newly created "Metropolis GZM".

The second class of regions (C3) included five provinces in 2010, i.e., Lodz Province (Łódzkie), Pomerania Province (Pomorskie), Silesian Province (Śląskie), Greater Poland Province (Wielkopolskie) and West Pomerania Province (Zachodniopomorskie). These are the provinces with many industrialised urban centres, with fairly well-developed infrastructure. In the Lodz Province (Łódzkie), once a concentration of textile companies, modern industry is now being recreated, increasingly taking advantage of the area's central location in Poland. The functional integration of Lodz and Warsaw is also progressing, resulting in a gradual convergence of land use surrounding these cities, which is encouraging investor interest (in the Solidarity Transport Hub Poland plan). Pomerania Province creates a strong Gdansk–Gdynia–Sopot metropolitan area, oriented to attract residents, businesses and tourists, referring to the centuries-old harbour traditions of Gdansk. The surrounding agricultural areas provide a residential hinterland with great recreational potential. Greater Poland Province is a region with many industrial centres, led by Poznan, and well-developed agriculture. It is attractively located in relation to transportation routes (on the lines Berlin–Warsaw–Russia and Gdansk–Prague), taking advantage of this to build a network of economic cooperation with Western European countries (e.g. the Greater Poland Cluster 'Mebel Design'). The West Pomerania Province focuses its economic advantages primarily on the potential of Szczecin and the surrounding smaller cities. Agricultural activities are undertaken in other areas, while there are many tourist destinations along the coast. The region's western location fosters economic contacts with Germany and other Western European countries. Kuyavia-Pomerania Province (Kujawsko-Pomorskie), Lubusz Province (Lubuskie) and Lesser Poland Province (Małopolskie) joined the C3 class regions in 2020, while Silesian Province (Śląskie) and Pomerania Province (Pomorskie) left C3.

The third class of regions (C2) included six provinces in 2010: Kuyavia-Pomerania Province (Kujawsko-Pomorskie), Lubusz Province (Lubuskie), Lesser Poland Province (Małopolskie), Opole Province (Opolskie), Podlasie Province (Podlaskie) and Warmia-Masuria Province (Warmińsko-mazurskie). These are the regions with different characteristics. Kuyavia-Pomerania Province includes agricultural areas surrounding two large and industrialised cities of Bydgoszcz and Torun. Their economic potential is complemented by industrial activities carried out in several smaller cities. A peculiarity of Lubusz Province (Lubuskie) consists of its economic ties resulting from its direct proximity to Poland's western border. The region is the most forested area in Poland, which results in the features of agricultural activities and tourist advantages. Industry is concentrated in the region's two largest cities: Zielona Gora and Gorzow Wielkopolski. Lesser Poland Province (Małopolskie) is a region with a diverse economic situation. Its southern location has fostered economic contacts with Central and Southeastern European countries for centuries. The province's economic realities consist of a large number of service and industrial enterprises located in Krakow, the tourist potential of Podhale, companies operating in smaller towns, and a large number of small farms. Opole Province is the smallest region in Poland and is characterised by well-developed agricultural activities and industry concentrated in Opole and several smaller cities. The same is true of Podlasie Province (Podlaskie), which is further enriched by economic ties with the Baltic States. Its area is also home to many unique environmental resources (Bialowieza National Park, The Augustowska Primeval Forest), which attract foreign tourists. They also flock to the facilities located in Warmia-Masuria Province (Warmińsko-Mazurskie), which offers the recreational advantages of the Masurian Lake District. Agriculture in the area is characterised by a large number of organic farms. Service and industrial companies are mainly concentrated in Olsztyn. Pomerania Province (Pomorskie) and Holy Cross Province (Świętokrzyskie) joined the C2 class regions in 2020, while Kuyavia-Pomerania, Lubusz, Lesser Poland, and Podlasie provinces left the C2 class.

The last class of regions (C1) included three provinces in 2010: Lublin Province (Lubelskie), Subcarpathia Province (Podkarpackie) and Holy Cross Province (Świętokrzyskie). These are the poorest Polish regions. Lublin Province has extensive land used for agriculture, while service and industrial activities are located in Lublin and several other smaller cities. The region is located on Poland's eastern border, but its proximity to Belarus and Ukraine is currently not conducive to developing economic cooperation. The situation is similar in the case of Subcarpathia Province (Podkarpackie); the province includes many mountainous areas where tourism is developing. However, farms in its area are highly fragmented, which makes it difficult to obtain satisfactory profits there. Rzeszow is building its position as a modern service and industrial centre (Aviation Valley). Holy Cross Province (Świętokrzyskie) benefits from its central location in the country. It is an agricultural area with several smaller centres for locating industrial companies. In turn, the region's most important service activities are concentrated in Kielce. Podlasie Province (Podlaskie) joined the C1-class regions in 2020, while Holy Cross Province (Świętokrzyskie) left the C1 class.

The distribution of the results of the study indicates a significant spread in the value of the super-index, from 0.151 for Lublin Province (Lubelskie) in both 2010 and 2020, to the benchmark level of 1.0 for Mazovia Province (Mazowieckie) in 2010. This indicates that the level of poverty in the Polish regions is highly differentiated, and the correlation coefficient generally confirms the significance of the impact of the analysed regional conditions on the formation of the characteristics of this phenomenon[6].

[6] It's worth mentioning here some research focusing on the problem of inequalities in Poland. Keane and Prasad (2001) studied inequalities in Poland during the first decade of transition. Sączewska-Piotrowska (2018) conducted research in the area of income inequalities among households in Poland. Moreover, Brzezinski and Najsztub (2020) re-examined the evolution of income inequality in Poland in the process of the post-socialist transition.

Conclusion

The problem of poverty divides economists, generating lively discussions that contribute to the development of economic theory on the one hand, and attempts to empirically address the phenomenon on the other. However, despite the many actions taken at local, regional, national and international levels by public institutions, private institutions, NGOs and supranational organisations, reducing global poverty in all its manifestations remains a challenge.

Integration implemented by the European Union should result in a more even economic development, and reduction of development disparities, higher standards of living, reduction of poverty. Such goals have already been set in the treaty documents on which the EU (formerly the European Communities) is based. Achieving these goals has proven very difficult in practice. On the one hand, the successive enlargements of the European Communities / European Union led to an increase in development disparities (the so-called Eastern enlargement of the EU of 2004, 2007, and 2013 should be mentioned in particular); on the other hand, the European Union was facing external challenges and threats, which also resulted in increased inequality and increased poverty. The 21st century has brought a number of new challenges and threats to the European Union:

– The 2008+ global financial crisis significantly increased the level of development disparities in the EU, to which the EU responded with the Europe 2020 Strategy;
– The pandemic crisis triggered by COVID-19 provided the impetus for deepening disparities and increasing poverty levels. In response to the pandemic, the EU introduced Next Generation EU and reformulated the financial assumptions for 2021–2027 accordingly;
– Russia's aggression against Ukraine, coupled with the energy, migration and food crises and mounting inflationary pressures, are further threats to the European Union that could result in a further increase in disparities and a growing poverty problem.

The conducted research allows us to conclude that there is an increasing number and intensity of actions taken at the European Union level directed at promoting even development, bridging development disparities and reducing poverty. It is important to increase the consistency of EU action in response to the growing instability of the external environment, despite the obvious national differences. The peculiarities of poverty in Polish regions are influenced by different development conditions. Their identification made it possible to determine the hierarchy of the intensity of this phenomenon in different parts of Poland. The richest regions are those with strong urbanised areas (Warsaw, Wroclaw, Metropolis GZM), taking advantage of the economic and infrastructural potential, the foundations of which were created by pre-war investments. The poorest, on the other hand, are the agricultural regions of eastern Poland, with a small number of modern industrial enterprises, but slowly enriching their investment attractiveness since the 1990s.

Limitations of the research included limited access to data – to statistical information (not all diagnostic variables connected with the issue of poverty could be used in the research due to the fact they were not available). Moreover, the limitations of the research were due to the ongoing pandemic, which was compounded by a full-scale military conflict in Ukraine and the imposition of sanctions on Russia, which were associated with growing energy, migration/refugee and food crises and rising inflationary pressures. Undeniably, these factors should be viewed as a source of growing disparities and deepening poverty. Unfortunately, it is too early to fully assess and analyse their impact on the situation of Poland's regions. Further studies should focus on a detailed analysis of the implications of the COVID-19 pandemic and the military aggression of the Russian Federation against Ukraine on the situation of Poland's regions. They should also include a comparative analysis and evaluation of poverty in Poland's regions against the background of other European Union Member States' regions.

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Summary

Poverty is a multidimensional phenomenon, hard to define but of interest to many experts in social sciences. When it comes to economic sciences, the economic dimension of poverty and its consequences are underlined. The European Union pays attention to the problem of developmental disparities as well as the need to reduce poverty and disparities. It is reflected both in the EU treaties and in the EU activities undertaken within both the Economic, Social and Territorial Cohesion Policy and the Lisbon Strategy, the Europe 2020 Strategy, as well as the EU reaction to the numerous challenges facing the EU in the 21st century (the COVID-19 pandemic, Russian aggression against Ukraine). The main theoretical and cognitive aim of the research is to present the differentiated perception of the problem of poverty in economic theory and EU policy decisions. The main aim of the empirical part of the research is to identify and evaluate regional disparities in poverty using the example of Poland's regions (provinces). The research was conducted with the application of several scientific methods, including literature studies, descriptive and comparative analysis, and critical thinking. Because of the complexity of the category of poverty and poverty conditions, the selected method of multivariate comparative analysis, i.e. the TMD introduced by Hellwig, was adopted. The conducted research indicated that poverty in Poland's regions is unequally distributed, which results from their location in relation to richer markets, infrastructure conditions, and economic situation.

Keywords: poverty, region, EU policy, disparities, Poland.

Ubóstwo w polskich regionach w świetle polityki Unii Europejskiej

Streszczenie

Ubóstwo jest zjawiskiem wielowymiarowym, trudnym do zdefiniowania, ale będącym przedmiotem zainteresowania wielu specjalistów z zakresu nauk społecznych. W przypadku nauk ekonomicznych podkreśla się ekonomiczny wymiar ubóstwa i jego konsekwencje. Unia Europejska zwraca uwagę na problem nierówności rozwojowych, a także na potrzebę ograniczania ubóstwa i nierówności. Znajduje to wyraz zarówno w traktatach unijnych, jak i w działaniach UE podejmowanych zarówno w ramach polityki spójności gospodarczej, społecznej i terytorialnej, jak i Strategii Lizbońskiej, Strategii Europa 2020, a także w reakcji UE na liczne wyzwania stojące przed nią w XXI wieku (pandemia COVID-19, agresja Rosji na Ukrainę). Głównym celem teoretycznym i poznawczym badań jest przedstawienie zróżnicowanego postrzegania problemu ubóstwa w teorii ekonomii i decyzjach politycznych UE. Głównym celem empirycznej części badań jest identyfikacja i ocena regionalnych zróżnicowań ubóstwa na przykładzie regionów (województw) Polski. Badania zostały przeprowadzone z zastosowaniem kilku metod naukowych, w tym: studiów literaturowych, analizy opisowej i porównawczej, krytycznego myślenia. Ze względu na złożoność kategorii ubóstwa i warunków ubóstwa badania prowadzono z zastosowaniem wybranej metody wielowymiarowej analizy porównawczej, tj. taksonomicznej miary rozwoju Hellwiga. Przeprowadzone badania wskazały, że ubóstwo w regionach Polski jest nierównomierne, co wynika z ich położenia względem bogatszych rynków, warunków infrastrukturalnych, sytuacji gospodarczej.

Słowa kluczowe: ubóstwo, region, polityka UE, nierówności, Polska.

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