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## FROM THE EDITORIAL COMMITTEE

We are giving you the next 29th 4 (2022) issue of the Scientific Journal of the Faculty of Management at the Rzeszow University of Technology entitled “Humanities and Social Sciences”.

The aim of the Publisher is to raise the merits and the international position of the quarterly published by the Faculty of Management, that is why we are still developing the cooperation with foreign team of reviewers, as well as an international Scientific Council. The Editors have also attempted to apply for international databases; currently the quarterly HSS is indexed in **Index Copernicus Journal Master List, The Central European Journal of Social Sciences and Humanities (CEJSH) ERIH PLUS, DOAJ and EBSCO**.

The Journal has been also included in the list of projects qualified for funding under the **“Support for scientific magazines program”**.

The articles published in this publication are devoted to the broader issues of the humanities and social sciences. They are the result both of theoretical and empirical research. The subjects covered vary considerably and reflect the interdisciplinary nature of the Journal. We do hope that the papers published will meet your kind interest and will be an inspiration to further research and fruitful discussions.

On behalf of the Editorial Board of “Humanities and Social Sciences” we would like to thank the Authors for sending the outcomes of their research. We would like to express particular gratitude to the Reviewers for their valuable feedback that greatly contributed to increasing values of the scientific publications.

With compliments  
*Editorial Committee*



Agnieszka CHOLEWA-WÓJCIK<sup>1</sup>,  
Carlo INGRAO<sup>2</sup>,  
Krzysztof HORNICKI<sup>3</sup>

## IMPLEMENTATION OF ACTIONS FOR EXTENDED PRODUCER RESPONSIBILITY AS A PROPOSAL TO STREAMLINE POST-CONSUMER PACKAGING MANAGEMENT SYSTEMS IN POLAND

The transposition of new regulations into national legal systems, including updated goals and requirements for the management of packaging placed on the market and packaging waste, provides a number of opportunities for the operation of post-consumer waste management systems. This publication focuses on the essence and characteristics of the system of extended producer responsibility in selected European countries. This paper identifies, on the basis of an analysis taking into account the scopes of legal, economic, physical, and informational liability, key areas of the extended producer responsibility system requiring improvements. It develops recommendations regarding the possibility of introducing changes to the functioning of the EPR system in Poland. The implementation of the improvement proposals for the EPR can significantly contribute to achieving the existing EU waste targets, as well as the ambitious new targets included in the EU Circular Economy.

**Keywords:** extended producer responsibility, post-consumer packaging management system, packaging waste.

### 1. INTRODUCTION

Concept of Extended Producer Responsibility (EPR) emerged in the 1980s, when European countries were reporting a rapid increase in the volume of packaging waste for the first time. In response to these issues, the European Community adopted the Directive on Packaging and Packaging Waste in 1994. The latter was incorporated into national packaging waste regulations and directly contributed to setting up Polish packaging

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recovery organisations (e.g. Rekopol, Eko-Punkt, Biosystem), which were created with the main aim of expanding producer responsibility into action. The essence of the concept in question is to build and finance a waste collection and recycling system ensuring the circulation of waste in the economy and making sure that waste is valorised as a zero-burden resource and is not misused. Nowadays, EPR is perceived even in a broader sense and is understood as the tool making it possible to put the some assumptions of circular economy into practice. Hence, so much importance is attached to establishing detailed rules for the functioning of packaging waste management systems. The article aims to analyze the functioning of EPR systems in Poland. The article uses methods of observation and analysis of texts and documents. Based on the conducted research, develop guidelines for the proper implementation of EPR in Poland.

## **2. MULTIFACETED VIEW ON EPR SYSTEM: FINDINGS FROM AN IN-DEPTH REVIEW OF THE LITERATURE**

The EPR concept was introduced for the first time in the specialised literature by Thomas Lindhqvist (1992). He defined it as an environmental protection strategy to reach an environmental objective of a decreased total environmental impact from a product, by making the manufacturer of the product responsible for the entire life-cycle of the product and especially for the take-back, recycling and final disposal of the product. The Extended Producer Responsibility is implemented through administrative, economic and informative instruments. The composition of these instruments determines the precise form of the Extended Producer Responsibility. According to Lindhqvist (2000), such can be achieved by making product manufacturers both aware of and responsible for the environmental impacts and benefits associated with the end-of-life scenarios their products can be addressed to. Those scenarios are so in charge of the producers, and include take-back, recycling and final disposal of the product. A similar view on EPR was put forward by Nash and Bosso (2013), who considered it to be an environmental protection policy that is oriented to:

- Minimising the effects of external production and consumption processes;
- Allocating responsibility for the entire life cycle a product to its manufacturer.

EPR is also described as a concept aimed at devising management systems for certain types of post-consumer waste, which includes not only packaging waste, used electrical and electronic equipment and used batteries and accumulators, but also end-of-life vehicles (Patowska, Karbowska, 2016). On the other hand, Piontek (2018) defined EPR as the readiness or need to take positive and negative consequences ensuing from internal and external effects. Simultaneously, EPR is treated as an attempt to materialise the paradigm of the key importance of natural resources and their rational utilisation for the proper growth of the economy (Piontek, 2018). Whereas, concerning to the legal aspects of EPR, those were the focus of attention of several scholars, such as Karpus (2014) and Korzeniowski (2015). In their publications, the authors expounded on how model elements worked out as part of the EPR concept could translate into the language of legal norms. Furthermore, they presented the extent and manner of incorporating them in to the concept the EU and Polish waste law.

An analysis conducted to find out how EPR is understood and perceived in the literature, also taking into account the aspects of such perception, reveals that authors put different interpretations on how the prescriptive, legal, economic, financial, physical or informational



dimension is identified and seen by them. Therefore, one may say that EPR is a research issue that needs an interdisciplinary approach. Given the fact that the EPR concept, seen both as one of the main waste management methods and as an instrument of a policy designed to support the implementation of the European waste hierarchy, is multifaceted, it requires a holistic view necessary to identify area-specific actions enhancing the manner in which the very concept is applied (Miliot et al., 2018).

### 3. OPERATION OF EPR SYSTEM IN SELECTED EUROPEAN COUNTRIES

EPR is treated in EU acts as one of the fundamental legal institutions allowing to attain new objectives of waste law or, in a broader sense, as an environmental protection policy shaped in line with the sustainable development principle (Ezroj, 2009; Ezroj, 2010). Due to the fact that sustainable development is tackled differently in individual countries, the EPR-system advancement also varies from one state to another. There are two models of the EPR system which prevail in the European Union. As regards the first model, organisational and financial responsibility rests with producers, like done in Germany, Austria or Poland. Whereas in the case of the second model, it is delegated to communes, and producers only share collection costs. This is a common practice in European countries like France and Norway. Apart from differences in how the EPR-system models were put into practice, there are also marked discrepancies in the operation of organisations that discharge product manufacturers' duties arising from extended producer responsibility. For instance, in Romania, Austria, and Slovakia, recovery organisations compete with each other, whereas in Germany and France practices were based on monopolistic systems, which used to function in the past, covering only unit packaging (Gupt, Sahay, 2015).

Irrespective of which EPR model is preferred in a given country, the cornerstone of the subject on EPR is the concept of the responsibility for waste and, in wider terms, for products, which will become a wastes in future. From a model perspective, there exist different types of responsibility that can be distinguished as follows (Ezroj, 2009):

- Legal responsibility, understood as legal responsibility for the environmental damage caused by a product which is in various phases of its life cycle, including when that has become waste;
- Economic responsibility, that is the obligation of incurring the costs of collection, recovery and final disposal of post-use commodities that have become waste to be treated;
- Physical responsibility, which means the obligation to carry out waste management operations independently by a manufacturer of a product;
- Informative responsibility, which refers to a manufacturer's duty to inform on the properties of a product manufactured and on a manufacturer's actions aimed at addressing environmental risks.

It is worth mentioning that the aforesaid obligations setting out the substantive scope of the EPR concept model may be perceived by the EU legislator and Member States' lawmakers differently, depending on targets set by them.

In Poland, the EPR system covering packaging and packaging waste has been in effect since 1 January 2002 (PPW, 2001) and is based on Union requirements laid down in the 1994 Directive (Directive 94/62/EC), which were transposed into the Polish law. Poland implemented these provisions relatively late, especially in comparison with the states of the former EU-15, namely the Netherlands (1991), Germany (1991) and Belgium (1992), which

were the first ones to do so. A huge advantage of this situation is that Poland could draw on the experiences of other Member States and try to avoid the past mistakes they made (e.g. incorrect methods of packaging classification). What must be seen as a disadvantage, however, is the fact that the Polish EPR falls far behind the corresponding systems that work in the other countries. It will be a huge problem for Poland severely, as there is a pressing need for streamlining EPR mechanisms to ensure compliance with the provisions of the 2018 Directive (Directive (EU) 2018/851), and specifically, Article 8a, which lays down minimum requirements for extended producer responsibility systems (Żakowska, 2019).

Under this perspective, critical analysis of the EPR system currently adopted in Poland was carried out by this team of authors with key aim of contributing to enhancing the specialised literature and knowledge. Starting from reviewing and building upon the scopes of the legal, economic, physical and informative types of responsibility, the authors could highlight the key areas that require improvements:

- The operation of the packaging waste management system;
- The shadow economy practices in the Polish waste industry;
- Placing on the market of packaging which after being used is unsuitable for recycling or hinders the process considerably;
- Raising the ecological awareness of society as regards packaging placed on the market and packaging waste being generated.

### **3.1. Financing of Packaging Waste Management System**

Entities that place packaged products on the Polish market are required by law (MPPW, 2013) to make sure that packaging materials are sent to recycling after use. The foregoing obligation must be discharged by entities alone or through dedicated external entities – packaging recovery organisations. Based on a Polish public register, which is an integral part of the Product and Packaging and Waste Management Data Base (a so-called “BDO”), it follows that in Poland, there were 25 packaging recovery organisations in 2021, which discharged legal obligations relating to extended producer responsibility on behalf of economic operators. Considering that only 42% of the plastic packaging waste generated in the EU is recycled, it is necessary to opt for additional solutions that enable increase increasing that share, chief among those solutions is the use of the depository system collection and recycling (Kutyna-Baklarska, Kulezycka, Dziobek, 2021). This is due to fact that, in 2020, more than 6.3 million tonne packages were used in the Polish market, which means a marked increase compared to previous years. This is not only caused by the continuous growth of the packaging industry, but also results from the fact that e-commerce has become very popular (Report, 2021).

Even though relevant legal regulations have been in force for nearly twenty years, the Polish EPR system still fails to attain to its purpose. Such should be attributed mainly to the fact that all needed operations of post-use package collection and processing severely lack funds. One of the facts showing the scale of irregularities is that economic operators placing packed products on the Polish market bear EPR-related expenses which are estimated to be approximately PLN 40 million, annually. Whilst, the actual cost of the management of the generated packaging waste totals around PLN 1.4 billion per year (Moskwik, Krupa, Lachowicz, Roszkowski, 2020). Consequently, when it comes to recycling waste into secondary raw materials that are processed into value-added commodities, a substantial investment gap can be observed in Poland, which is the principal reason why the actual

capacity of domestic waste processing facilities is substantially reduced. Table 1 demonstrates the scope of investment necessary for selected waste management projects in Poland.

Table 1. Summary of capital expenditures on selected types of waste

Type of waste	Type of project	Required expenditures for developing waste management systems [PLN billion]	
		Years 2020–2028	Years 2029–2034
Glass waste	New glass cullet treatment plants for processing of glass cullet before it goes for recycling	0.225	0.075
Paper and cardboard waste	New material recycling plants	1.700	2.600
Plastic waste	New material recycling plants	3.440	0.860
Non-ferrous metal waste	Provision of non-ferrous metal separators to existing plants	0.110	0.010

Source: Personal elaboration from (Moskwik et al., 2020).

Based upon Table 1, it can be asserted that most of waste is generated on the domestic scale. Therefore, the expenditures shown in Table 1 must be deemed necessary if Poland intends to properly comply with EU requirements concerning extended producer responsibility. The scope of investment for projects related to certain secondary raw materials, to be carried out in Poland, has been tentatively determined. For instance, for glass cullet, three – four treatment plants must be erected by 2034, each having the treatment capacity of 150,000 Mg per year, which requires financial expenditures of approx. PLN 300 million. Whereas, as regards non-ferrous metals, existing waste sorting plants must be principally provided with 250-300 separators along with necessary equipment by 2028, which will require an estimated amount of PLN 100–120 million (Moskwik et al., 2020). Irrespective of individual investment decisions, it should be emphasised that the Polish waste management system is seriously underfunded, and this is valid also for the packaging waste.

Furthermore, it must be stressed that funds obtained for EPR must be considerably increased. The EU legislation (Directive (EU) 2018/851) specifies very clearly (Article 8a(4)(a)) the type of costs which must be covered by economic operators which place packaged products on the market. The most important of them include the cost arising from the separate collection of packaging waste and its subsequent transport and processing, which should be further reduced by revenue from the reuse of packaging, sale of secondary raw materials and unclaimed deposit fees. It is extremely difficult to assess the actual level of that cost, as it should be determined separately for each significant group of used packaging, whilst taking into account its unique properties, including particularly its durability, repairability, re-usability, recyclability and the presence of hazardous substances (Directive (EU) 2018/851). Furthermore, another difficulty that economic operators have to face is that expenses incurred by them must include revenue from the sale of secondary raw materials, whose value varies over time and depends on multiple factors, of which the

most important is their quality understood in terms of cleanliness, uniformity and degree of sorting. In consideration of the Polish market, it is claimed that, only with respect to aluminium fraction (beverage cans) and PET plastic (beverage bottles), the revenue from raw material sale is higher than the costs relating to the management of that waste incurred at the earlier stage (Deloitte, 2021). There are, however, other products, like composite packaging and some polymers (e.g. PVC or EPS), that are not suitable for recycling and are often treated for energy production or conventionally disposed of in landfills. This is mainly to be attributed to the fact that those types of packages are made out of multiple materials that are assembled in a way separation is not technically or economically feasible.

Apart from the aforesaid cost of separate collection, transport and processing of packaging waste, entities that place packed products on the market are further required to spend specific funds on ecological education and the maintenance of administrative systems used for data gathering and reporting (Directive (EU) 2018/851). However, in this case, it is much easier to assess the level of expenses to be borne by economic operators, which may include both flat charges and charges which depend on the value of packaging placed on the market or the amount of revenue earned.

To determine the amount of costs incurred in Poland for EPR, it is necessary, in the first instance, to ensure that a Polish public register of packaging placed on the market along with products contains all relevant details. To this end, packaging is to be classified, as required by law (Directive (EU) 2018/851), into household packaging and other types packaging, like those used for transport (e.g. wooden pallets or stretch film). This is because, financial expenditures on its collection, separation and further management differ considerably depending on packaging category. As a consequence of such a distinction, higher rates of charge would be fixed for economic operators that place inner packaging on the market (poorer quality of secondary raw materials and the need for preliminary processes, such as sorting and additional cleaning). Lower rates would apply whereas to transport packaging, which has higher quality of secondary raw materials and readiness for recycling process.

The above classification of packaging will make it possible to take another step towards streamlining the EPR system, namely to gather real data on the actual costs of the management of individual types of packaging waste. For that purpose, it is necessary to create an additional module operating as part of the BDO system (a so-called “financial reporting module”). That module could be used for gathering data and information on costs relating to the collection, transport and processing of packaging waste and revenue from the sale of secondary raw materials. Financial flows, which had not been subjected to environmental reporting activities before, should be indeed available for inspection by administrative authorities who are in charge of monitoring and controlling waste management operations. Therefore, the EPR system regulator (e.g. The Institute of Environmental Protection – National Research Institute) should compile every year, based on data gathered in the “financial reporting module”, a publicly available report containing information on the costs of packaging waste management incurred by respective packaging recovery organisations whilst discharging statutory obligations assumed from economic operators placing packed products on the domestic market. In fact, without that knowledge, neither the effectiveness of the EPR system operation could be enhanced, nor the rates of charges to be paid by entities placing packed products on the market could be determined in such an amount that would be sufficient to cover all costs, without imposing undue burden on economic operators of the small and medium size enterprises (SMEs). Complete

data would be available exclusively to the EPR system regulator and would be used for optimising processes and for verifying the accuracy of information entered into the waste management system. Reports generated for packaging recovery organisations would also not present unit costs incurred separately by each of the organisations' business partners (e.g. companies, which are collecting and recycling individual types of packaging waste). Data gathered in the "financial reporting module" would, hence, be utilised for the actual eco-modulation of the rates of charges and to ensure that each type of packaging material is settled separately. Such would imply taking into account the monetary costs collection and recycling of waste, and the revenue from sale of the secondary raw material obtained, without the possibility of subsidising material of one type by another one. Furthermore, obtaining accurate financial data would provide a valuable basis for further optimisation of the EPR system, e.g. through the application of lower charges to reusable packaging or packaging containing a specified percentage of recycled material.

### **3.2. Irregularities in Packaging Waste Management Operations**

The value of shadow market in waste in Poland is estimated to be close to PLN 2 billion, 37.5% of which is what it is lost every year by the Polish government due to VAT and income tax (Global Compact Network Poland, 2019). In 2018, a fire broke out at waste collection points in Poland 243 times (GUS, 2020), mainly due to warehoused or stored packaging waste, which in the overwhelming majority of cases was unsuitable for material recycling. So, it is urgently needed that efforts are made to avoid that those incidents are repeated in the future, as they heavily threaten the quality of the natural ecosystem, the health of humans, and the solidity of the economy.

Nevertheless, from the EPR point of view, the most serious problem is the fact that inaccurate or even false documents confirming the recycling of packaging waste are issued (so-called DPR and EDPR documents). Such documents concern waste that either does not exist at all or has never been waste from used packaging, which also precludes packaging recovery organisations from discharging their statutory obligations properly. It is estimated that for glass, paper, cardboard and plastic packaging waste, irregularities may concern approximately 30% of the documents in question, resulting in a loss of around PLN 252.7 million (Moskwik et al., 2020).

In this regard, the authors of this paper believe the way out is not to raise the rates of charges to be paid by economic operators placing packaged products on the market. This is mainly because Polish sectors of package manufacturing and after-use management as a waste need to be thoroughly streamlined in many operational aspects. This is particularly relevant in the context of diverse wealth level of the Polish people (the minimum salary is EUR 610), which is two and a half times lower than in Germany, and in view of the fact that EPR-related financial burden imposed on the business sector will be certainly passed to consumers purchasing packaged products at points of sale. Hence, a crucial improvement measure would be that of changing the role of packaging recovery organisations into entities engaged in the collection and management of waste or playing an intermediary role in the waste trade. Such a solution would definitely address the Polish problem of false documents being issued to confirm the recycling of packaging waste (Moskwik et al., 2020). Those actions would provide signing agreements directly with the packaging waste holders, under which waste collection and proper management would be ensured. On the other hand, under other specific agreements, packaging recovery organisations should be provided by packaging-waste processing operators in Poland and abroad, reliable information on the

quantity of on the quality-standard-fulfilling secondary raw materials that are obtained. Such agreements would translate into proper cash flows, which could be utilised by packaging recovery organisations to make payments for purchasing packaging waste, carrying out preliminary operations (sorting, additional cleaning, etc.) and, in the case of certain types of waste, also to make payments for the processing of them. In this way, those organisations would not deprive Polish municipalities of control over municipal packaging waste originating, but would only ensure that reliable documents on actually-recycled packaging waste are issued and has been actually delivered to a waste facility. This scenario will result in the distribution of the vast majority of funds directly from packaging recovery organisations to entities purchasing and recycling packaging waste from the market (mainly generated by households). Doing so will make it possible to reach required waste collection and recycling targets and ensure the maintenance of the highest standards and proper control at each operational stage. Only in this manner, packaging recovery organisations can bear full responsibility for their actions, and consequently, also for the proper discharge of statutory obligations assumed from entrepreneurs.

Furthermore, separate EPR systems for composite packaging and packaging used for hazardous agents must be no longer established and maintained. Realization of these systems currently takes place in Poland on a voluntary basis under agreements made between self-regulatory organisations and voivodship marshals. All packaging that is available on the market should be included in a general packaging waste management system and be subjected to the requirements of discharging statutory obligations only as part of a co-operation with packaging recovery organisations, which are dedicated and specialised entities ensuring the proper discharge of legal obligations.

To maintain the highest standards in this regard, it is necessary to introduce additional statutory requirements for packaging recovery organisations:

- Obligation to obtain licence to conduct operations;
- Obligation to increase the share capital to at least PLN 5 million;
- Requirement to carry out external audits designed to verify whether they operate correctly or not.

State authorities, on the other hand, are expected to appoint a Polish regulator of the EPR system, which could be either the Institute of Environmental Protection - National Research Institute or the Chief Environmental Protection Inspector, as both of them have relevant expertise and knowledge. The regulator's duties would include as follows: to draw up reports containing data gathered in the "financial reporting module", to verify reporting of all the stakeholders of the EPR system; to control financial flows in packaging waste management; to oversee DPR and EDPR documents and issue licences to packaging recovery organisations.

### **3.3. Placing on Market of Packaging Which After Being Used Is Unsuitable for Recycling or Hinders That Process Considerably**

Union legislation defines EPR as a set of measures taken by Member States, which require manufacturers of products to bear either financial or financial and organisational responsibility for the management of their products when they become a waste (Directive (EU) 2018/851). However, that definition seems to be incomplete, as it contains a reference only to the product's end-of-life, overlooking very important actions, such as eco-design or education and shaping proper consumer attitudes.

Eco-design is essentially based upon the incorporation of environmental aspects into the design and development of a product, whilst making sure it fulfils the required quality standards (ISO/TR 14062:2002). In the light of this, eco-design might be considered as a response to the problem of using packages that, due to their material composition, are not suitable for recycling and so can only be disposed of conventionally (Van Doorselaer, 2021; Yeang, Woo, 2010). From the practical point of view, eco-design might be used for developing a refined version of packaging with smaller environmental impact, but whose performance and role and function in supply chains is not altered (Karwowska, Żakowska, 2020). Therefore, according to this paper's authors' team, it would be necessary to introduce the packaging eco-design process to the Polish EPR system permanently. Such could be done not only through good business practices, but also very specific legal requirements that ban or limit the use of certain types of packaging materials (Zeng, Ertz, Durif, 2017). Such packaging range includes, for instance, plastics, whose combination in packaging material is very often the reason why used packaging is not suitable for material recycling, and consequently, is not in line with the circular economy. Combinations of various types of polymers in packaging has been prepared by the French Plastic Packaging Recycling Committee and presented in Table 2. According to their own accepted methodology, these combinations may be acceptable (designated as 1), acceptable to a limited extent (designated as 2) and unacceptable (designated as 3).

Table 2. Assessment of various plastic type combinations in packaging materials

Material of Packaging		Additional Material							
		PE-HD	PE-LD	PP	PVC	PS	PET	EVOH	PA
Prevailing Material	PE-HD	1	1	2	3	3	3	2	3
	PE-LD	1	1	2	3	3	3	2	3
	PP	2	2	1	3	3	2	2	3
	PVC	2	2	2	1	2	3	2	3
	PS	2	2	2	2	1	3	3	3
	PET	2	2	2	3	3	1	2	2
	PA	3	3	2	3	3	3	3	2
	PC	3	3	3	3	3	1	3	2

Source: Personal elaboration from (Karwowska and Żakowska, 2020).

A very popular Polish example of an unacceptable combination of two types of plastics is, for instance, a PET bottle with a shrinking film label made from PVC attached to it, which is unsuitable for recycling due to similar density of both polymers, and consequently, plastic separation by floatation is not possible. Such combinations are eliminated during the packaging eco-design process, for which mono-material structures are preferred in the first place – as they can be easily separated by household members and do not raise any issues when they go for recycling.

Eco-design includes also the use of secondary raw materials for production of packaging, thereby becoming the tool for implementing and promoting circular economy paths. In this regard, it is also necessary to introduce an unambiguous legal framework, which Poland needs to have in place to achieve the targets set out in the so-called SUP directive (Directive (EU) 2019/904). The key aim for that would be to lay down the

requirements, among other things, for a content of recycled plastic in single-use plastic beverage bottles (25% by 2025 and 30% by 2030).

As for another noticeable effect of packaging eco-design, Poland will meet recycling levels required by the European Union for individual types of packaging waste (Directive (EU) 2018/852) (Table 3).

Table 3. Recycling levels for packaging waste

Type of Packaging	Required Recycling Levels for Packaging Waste [%]		
	By 31 Dec 2021	By 31 Dec 2025	By 31 Dec 2030
Plastic packaging	23.5	50	55
Aluminium packaging	51	50	60
Steel packaging	51	70	80
Paper and cardboard packaging	61	75	85
Glass packaging	61	70	75
Wooden packaging	16	25	30

Source: Personal elaboration based upon (MPPW, 2013 and Directive (EU) 2018/852).

Table 3 shows recycling levels applicable in Poland in 2021 and to be reached by the end of 2025 and 2030, as set out by the Community. The example of plastic packaging demonstrates very clearly that without additional mechanisms, such as ecodesign, achieving the targets set in the directive will not be possible.

### 3.4. Raising Society's Ecological Awareness of Packaging Placed on Market and Generated Packaging Waste

Under current legislation (MPPW, 2013), entities that place packaged products on the Polish market are required to conduct public awareness campaigns, which they may run alone or through packaging recovery organisations. Nevertheless, one can still notice a low level of the ecological awareness of society, manifested in a lack of knowledge concerning basic issues, such as the proper separation of packaging waste, the need for cleaning it before disposal and understanding designations placed on packaging. On the other hand, popular demands for environmental protection and reducing a negative impact on the environment in the context of packaging have been already seen for years (Cholewa-Wójcik, Kawecka, Ingraio, Siracusa, 2019). The foregoing shows clearly that effective ecological education supporting the achievement of objectives resulting from EU membership should be also a vital component of the Polish extended producer responsibility system. Given isolated educational efforts made thus far in Poland by individual packaging recovery organisations, it is expedient to establish a nationwide educational programme in Poland, financed by economic operators placing packaged products on the market. This task could be coordinated by an advisory body appointed by the Minister of Climate and Environment, composed of representatives of all the Polish EPR system's stakeholders. The latter could include entities placing packaged products on the market, packaging recovery organisations, entities engaged in the collection and processing of packaging waste, social organisations and local governments. This would not only satisfy the requirements for a regular dialogue referred to in the EU directive (Directive (EU) 2018/851) but, first and



foremost, also provide a real opportunity for the exchange of ideas and opinions amongst system participants. Apart from matters relating to ecological education, the council would also perform, on an ongoing basis, EPR analyses, express opinions regarding legal acts and other documents, as well as draft and propose motions and legislative changes.

#### **4. RECOMMENDATIONS ABOUT IMPROVEMENT OF EPR SYSTEM'S OPERATION IN POLAND**

To make sure that waste management is developed according to the principle of a sustainable circular economy, it is required that EPR systems evolve towards an integrated holistic responsibility model. Given the identified and analysed areas for improvement, recommendations as to necessary actions designed to streamline the packaging waste management system in Poland were formulated by this team of authors. Amongst all the necessary actions to be performed, according to this papers' authors, the following deserve special attention:

- Forming an advisory body for packaging and packaging waste management, to be appointed by the Minister of Climate and Environment;
- Introducing additional legal requirements for the operation of packaging recovery organisations;
- Appointing the Polish regulator of EPR system;
- Observing the packaging eco-design principles;
- Classifying and categorising packaging placed on the market into household packaging and other packaging;
- Creating an additional "financial reporting module" operating as part of BDO;
- Determining the amount of financial expenses to be incurred by economic operators that place packaged products on the market based on the actual costs of the management of respective types of packaging waste;
- Ensuring that packaging recovery organisations' operations are focused on packaging waste collection or that they play an intermediary role in trade in such waste;
- Terminating voluntary agreements between self-regulatory organisations and voivodship marshals;
- Establishing a nationwide educational programme in Poland for the proper handling with packaging and packaging waste.

Introducing solutions that make a producer responsible for all products placed on the market is one of the preconditions for closing the loop of resources within economy (Leal Filho et al., 2019). The aforesaid direction for the EPR development is reflected in amendments to the EU legislation, which require the inspection of solutions adopted thus far and necessitate imposing minimum requirements for producers' responsibility for products placed on the market, including packaged products. The implementation of the EPR system, including the covering of the so-called net costs of packaging waste management in communes' municipal waste management systems, will mean the performance of the waste directive provisions, make the achievement of closed-loop economy objectives more viable and notably contribute to a reduction in costs borne by citizens and consumers.

## 5. SUMMARY

Given applicable EU regulations on post-consumer waste management, the EPR system must be changed. Improvements to the EPR system are necessary in order to ensure that the costs of all processes related to the management of waste covered by EPR are paid in the proper amount by manufacturers placing products on the market and to make sure that the EU requirements setting out the degree of recycling of specific waste types are satisfied. In view of the fact that 65% of the weight of municipal waste should be ultimately recycled in 2035, with the current levels not exceeding 30%, the situation appears to be seen as a matter of extreme urgency.

It must be remembered that EPR is the most relevant instrument for shaping the policy of closed-loop economy in the case of packaging and packaging waste. Hence raising funds is not an objective in itself for extended producer responsibility and cannot be perceived as such. Money obtained as part of EPR from entities placing packaged products on the market must cover specific costs, which are precisely set out in the EU directive (Directive (EU) 2018/851). This is particularly important to the Member States which perceive the stream of new funds as an opportunity for pursuing further social programmes covering, e.g. a direct reduction in the amount of charges for the collection of municipal waste generated in households. What deserves attention is the fact that consumers, as primary generators of waste, are responsible for its separate collection, hence they should independently cover the costs arising from the management of mixed waste which in the majority of cases is generated as a result of improper separation. Where the financing of the collection and processing of mixed waste or waste other than packaging waste is passed to entities placing packaged products on the market (e.g. through defective EPR mechanisms), this will result in worse effectiveness of waste separation by consumers, who will no longer have any incentives in this regard. Therefore funds raised and collected as part of EPR must be designated for streamlining national packaging and packaging waste management systems, and not provided to citizens of communes in the form of direct concessions or lower fees. On the other hand, the provisions of law must be also drafted in a manner ensuring that costs relating to EPR are not included in the prices of products and services straight away. In this case, there will be indeed a smooth shift from the polluter pays principle to the society pays principle and all costs will be ultimately borne by consumers, who purchase packaged products from retailers and wholesalers.

The improvement of EPR may substantially contribute to the achievement of existing EU targets relating to waste and new ambitious targets set in the EU's circular economy package. The implementation of EPR in respect of the streams of waste with plastic content in the EU demonstrated problems and weaknesses, from a lack of binding mechanisms to a lack of incentives, in order for companies to become fully engaged. Therefore, an EPR framework must be re-designed, and this should also encompass specific actions which will make it possible to apply the extended producer responsibility concept holistically.

The results of the research may support changes in EU legislation through the revision of existing solutions and the implementation of minimum requirements for the responsibility of producers for introduced products, including products in packaging.

The limitations of the conducted research result from the high volatility of trends resulting, for example, from changes introduced in legal regulations regarding topics directly and indirectly related to the subject of extended producer responsibility.

It is worth conducting further research on the impact of changes in legal regulations after the implementation of the ROP system in Poland in terms of its effectiveness and the possibility of implementing improvement measures.

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## **THE USURY CRIME UNDER ART. 304 OF THE PENAL CODE IN THE CONTEXT OF BREACHES OF SAFE TRADE RULES OF ECONOMIC TURNOVER**

This paper presents the issues that determine the security of business transactions, whose proper functioning is endangered by so-called usurers. It discusses crimes under Art. 304 § 1–3 of the Penal Code. The offense of usury, regulated in Art. 304 § 1 of the P.C., provides for the criminal liability of persons who, by taking advantage of the compulsory position of another natural person, legal entity, or organizational unit without legal personality, conclude a contract with it, imposing an obligation on it to perform disproportionate to the consideration. Article 304 § 2 and 3 of the P.C. regulate new types of usury, introduced into the legal system by the amendment of May 14, 2020, which penalizes behavior directed against consumers, consisting in demanding excessive interest or non-interest costs for providing a benefit with the obligation to return.

**Keywords:** usury, economic turnover, security, penal code.

### **1. INTRODUCTION**

The concept of usury is commonly understood as concluding an unfavorable contract for one of the parties, in a situation where the other party, using the compulsory position of the former, obtains excessive and unjustified profit. On the other hand, in colloquial language, it primarily means “borrowing money at a very high percentage and achieving great benefits from it” (Sobol, 1985). Usury is directly regulated by both civil and criminal law. The civil law aspect is provided for in Art. 388 of the Civil Code (The Civil Code Act, 1964), while the offense of usury, also referred to in the literature on the subject as the exploitation of a contractor, is regulated in Art. 304 of the Penal Code (Penal Code Act, 1997b).

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The purpose of the paper is to present and analyze the current legal state of affairs in combating the threats posed to the security of economic turnover by the behavior of its participants, which exhausts the elements of the crime of Article 304 of the Penal Code.

The offense of usury was already regulated by the Penal Code of 1932 (The Penal Code Regulation, 1932). Pursuant to Art. 268, the behavior of the perpetrator who, exploiting the coercive position of another person, concluded a contract with them, imposing on them an obligation to provide material benefits, obviously disproportionate to the consideration, was subject to penalisation. The perpetrator was subject to imprisonment of up to 5 years or arrest. A very similar regulation was also contained in the Penal Code of 1969 (The Penal Code Act, 1969) in Art. 207, under which the criminal liability was borne by a person who, taking advantage of the compulsory position of another person, concluded with them an agreement imposing an obligation on them to provide obviously disproportionate to the consideration. The perpetrator was punishable by imprisonment from 6 months to 5 years 5. Both of the above-mentioned legal acts placed the offense of usury in the chapter regulating crimes against property, and the difference between these regulations was practically only in the type of service constituting the subject of the perpetrator's executive act. The Penal Code of 1932 limited the commission of this offense to a situation where the contract concerned pecuniary benefits, in a situation where such a limitation was no longer provided for by the provisions of the 1969 Penal Code.

In the original wording of the currently binding Penal Code of 1997 (The Penal Code Act, 1997a), the crime of usury was regulated in Art. 304. This regulation, in relation to the provisions of the above-mentioned codes, on the one hand, extended the penalisation due to the fact that the benefit of the injured party no longer had to be "obviously" disproportionate, on the other one it lightened the criminal sanction for committing this offense, providing for imprisonment up to years 3.

Article 304 of the Penal Code was amended by the Act of May 14, 2020 amending certain acts in the field of protective measures in connection with the spread of the SARS-CoV-2 virus (The Act on the amendment..., 2020), which left the previous wording of the article unchanged, marking it as § 1 and introduced two additional types of usury, marking them as § 2 and § 3, which, as the legislator himself provides in the justification of the bill, apply to acts against natural persons outside the scope of their economic activity, i.e. in the area of their private life ([www.sejm.gov.pl](http://www.sejm.gov.pl), 01.09.2022.). This change is aimed at protecting the weaker side of economic transactions, which is the consumer, due to the lower level of awareness of threats among this group of participants in legal transactions. The existing provision of this article, left in § 1 Art. 304 of the Penal Code, relying on the autonomy of the will of the parties on the competitive market, without differentiating the legal situation of the injured party, regardless of whether he is an entrepreneur or a consumer, did not provide such protection. Therefore, in the opinion of the legislator, while "in relation to an entrepreneur, it is justified to make criminalization dependent on subjective elements related to the assessment of its current position, in the case of consumers, the features of the act should be determined while maintaining the objective factor" ([www.sejm.gov.pl](http://www.sejm.gov.pl), 01.09.2022.).

## 2. THE STRUCTURE OF THE USURY CRIME FROM ART. 304 P.C.

### 2.1. The subject of protection

The subject of protection under Art. 304 of the Penal Code § 1–3 of the P.C. is to secure the rules of fair and safe business transactions. According to R. Zawłocki, the subject of protection is “undisturbed economic turnover free from exploitation, maintaining honesty and a relative balance of mutual benefits by the parties” (Zawłocki, 2017). Art. 304 § 1 of the P.C. primarily protects the individual property interests of professional and non-professional trading participants, in particular those who are in a forced position. On the other hand, Art. 304 § 2 and 3 of the P.C. they only protect the property interests of consumers. In the light of the current regulations, this protection *de facto* applies to persons concluding a consumer loan agreement with the entrepreneur.

### 2.2. The subject of the crime

The subject of the crime under Art. 304 § 1 of the P.C. can be any natural person capable of being criminally responsible (a common crime) (Majewski, 2022). As for the crimes specified in Art. 304 § 2 and 3 of the P.C. in terms of defining the subject of these crimes, opinions are divided in the literature on the subject. The prevailing view is that they are also common crimes. This position is supported by the structure of these provisions, which indicates that the perpetrator who demands from a natural person the payment of exorbitant amounts in exchange for the provided cash benefit is subject to criminal liability. Due to the fact that such receivables may be sold, there is no limitation that only an entrepreneur may be the claimant, and thus a natural person who does not conduct business activity may also be the claimant. Therefore, these circumstances indicate that also crimes under Art. 304 § 2 and 3 of the P.C. are common crimes.

### 2.3. The subject side

It is undisputed that the subject of the crime under Art. 304 § 1 of the P.C. is deliberate. The perpetrator should be aware of the disproportionate benefit imposed on the other party of the legal relationship with the mutual benefit offered (Buczowski, 1999). On the other hand, the doctrine has different opinions as to whether only a direct intention is possible, i.e. the perpetrator must not only be aware of, but also want to take advantage of the forced situation of the victim, or whether it is possible to commit this crime also with a possible intention. Some representatives of the criminal law science take the position that due to the trait of “exploitation”, the possibility of committing this crime with possible intention is excluded, while others assume that the perpetrator may also anticipate the possibility of the victim being in a forced position and he agrees to it, which, in their opinion, also makes it possible to assume the form of a possible intention.

It seems, as J. Majewski rightly emphasizes, that accepting the possibility of committing a crime under Art. 304 § 1 of the P.C. with the possible intention, in the context of the application of interpretation rules based on the linguistic directives of the verb of a crime, by interpreting the word “exploit”, it would lead to an interpretation prohibited by criminal law, extending the features of a crime (Majewski, 2022).

In turn, the crimes under Art. 304 § 2 and 3 of the P.C. they belong to the category of intentional crimes which can undoubtedly only be committed with a direct intention. Any intention in this case is excluded due to the necessary purposefulness in the perpetrator's action.

#### 2.4. The subject matter side

The subject matter of the offense under Art. 304 § 1 of the P.C. consists in taking advantage of the compulsory position of the entity indicated in the provision by concluding an agreement with it, imposing on it an obligation to perform disproportionate to the consideration.

The enforcement activities of the perpetrator of the usury offense consist in concluding the so-called a usury contract, i.e. one that imposes on the other party to the contract the obligation to perform disproportionate to the consideration, and it is necessary that the perpetrator, by concluding such a contract, exploits the forced position of the victim (Kozłowska-Kalisz, Szczekala, 2014).

The forced position of the victim means a factual situation in which the conclusion of an unfavorable contract is, in principle, the only way for them to avoid the danger that threatens them, their relatives or, for example, their business activity. For compulsory position within the meaning of Art. 304 § 1 of the P.C. a situation in which the aggrieved party is forced to conclude an agreement unfavorable for itself is assumed. It carries out such a transaction in order to avoid the threat of severe harm or other physical or moral unpleasantness (Wyrok, 2018). The essence of the compulsory position is the necessity to obtain a benefit, which is to improve or prevent the threat of damage (Wyrok, 2016). The prevailing view in the doctrine is that the compulsory position of a party to a usury agreement is an objective category (Majewski, 2022; Michalska-Warias, 2016). On the other hand, the reasons for its occurrence are irrelevant for the fulfillment of the criteria of a prohibited act under Art. 304 § 1 of the CC This does not exclude a situation where the aggrieved party finds himself in a forced situation through his own fault (Oczkowski, 2020).

Exploitation, i.e. the use of compulsory positioning, means that the perpetrator is fully aware of the victim's situation and uses it, leading the subject in a compulsory position to conclude an unfavorable contract for them. If there is no such awareness on the part of the perpetrator, the criteria of a prohibited act under Art. 304 § 1 of the P.C. (Kulik, 2022; Michalska-Warias, 2016).

A disproportionate benefit is one that is significantly disproportionate to the benefit offered in return by the perpetrator. At the same time, the legislator does not require that it should be obvious disproportionate (Majewski, 2022). This means that, in principle, disproportionate will be any benefit where the difference between its value and the value of the consideration exceeds the disproportion between mutual benefits permitted and justified in a given market situation. Nevertheless, it should exhibit features that are so unfavorable to the aggrieved party that it can be concluded that it will directly threaten him with a great ailment, and it will not be any situation that worsens the condition of the aggrieved party (Wyrok, 2014).

This makes it necessary to compare the benefits specified in the contract on both sides of the agreement. Not every disproportion between the performances of the parties to the contract will result in considering the service disproportionate. Although the legislator in the regulation of 1997 abandoned the term "obvious disproportionate", which appeared in earlier codes, it should nevertheless be significant. Undoubtedly, a certain determinant of the limits of the permitted disproportion between the parties' services are the civil law provisions, which often indicate the framework in which the parties to the contract can operate in the regulation of mutual benefits (Zalewski, 2015).



For the legal existence of this crime, it is necessary to conclude a contract, therefore the perpetrator and the aggrieved party must submit unanimous declarations of will, leading to the creation of a legal relationship. The contract must provide mutual services by both parties. Any type of benefit may be the subject of the contract. They can be cash and non-cash benefits, but also property and non-property benefits. It is also not required that the benefits included in a given contract are of the same type (Górniok, 2000). In addition, the very conclusion of an unfavorable contract is important, but it will not matter whether it was performed or not (Bafia, Mioduski, Siewierski, 1987; Bojarski, 2006), as well as whether there was a real violation of the property interests of the aggrieved party (Byczyk, 2016).

The subject matter of the offense under Art. 302 § 2 of the P.C. consists in the perpetrator demanding from a natural person not conducting business activity (consumer) non-interest costs, the amount of which is at least twice the maximum statutory costs, in exchange for a cash benefit granted to him with the obligation to reimburse.

Non-interest costs referred to in article 1. 304 § 2 of the P.C. as “costs other than interest” means any costs, other than interest, that may be related to the provision of a cash benefit with the obligation of reimbursement, which include, in particular, fees, commissions, margins, etc. Important in determining the fulfillment of this offense is the fact that these must be the types of costs for which the legislator has provided for a formula allowing the determination of their maximum amount in a legal act of the statutory order or has made it unequivocally by indicating the maximum amount. In the current legal system, such a situation takes place only in the case of granting a consumer loan on the terms specified in the Act of 12 May 2011 on consumer credit (The Act on credit..., 2011).

The subject matter of the offense under Art. 304 § 3 of the P.C. consists in the perpetrator demanding from a natural person not conducting business activity (consumer) interest, whose amount is at least twice the maximum statutory interest or the maximum statutory interest for delay, in connection with the granting of a cash benefit with the obligation to return it.

The maximum interest is specified in Art. 359 § 21 of the Civil Code<sup>1</sup>, according to which this is interest, the annual rate of which is twice the amount of statutory interest. In turn, Art. 359 § 2 of the Civil Code points out that statutory interest amounts to twice the sum of the reference rate of the National Bank of Poland and 3.5 percentage points.

The maximum interest for the delay is set out in Art. 481 § 21 of the Civil Code, under which this is interest, the annual rate of which is twice the amount of statutory interest for delay, and these in turn are specified in Art. 481 § 2 of the Civil Code, according to which they are twice the NBP reference rate and 5.5 percentage points.

For the legal existence of crimes under Art. 304 § 2 and 3 of the P.C. it is necessary to jointly occur two events: prior establishment of an appropriate legal relationship with the consumer, the subject of which is the provision of a cash benefit with the obligation to return, and then the demand for payment of non-interest costs or interest in an unlawful amount. The very conclusion of the contract, which results in the consumer's obligation to pay the above-mentioned benefits indicated in art. 304 § 2 and 3 of the P.C. amount does not constitute a crime, although it is necessary as a prior act. However, it will be realized only when the demand for payment is formulated against the consumer.

### 2.5. Penal threat and prosecution

The misdemeanor under Art. 304 § 1 of the P.C is punishable by imprisonment from one month to three years, which allows the legislator to assume that it is a crime of average social harmfulness and does not pose a significant threat to society (Jarska, 2001). Misdemeanors under Art. 304 § 2 and 3 of the P.C. are subject to the penalty of deprivation of liberty for a term of between 3 months and 5 years. 304 § 1–3 of the P.C. are prosecuted in a public prosecution procedure, *ex officio*.

### 3. SECURITY OF ECONOMIC TRADE AND THE OFFENSE UNDER ART. 304 P.C.

There is no legal definition of the term “economic turnover” in Polish law, nor is there any distinction between economic turnover and trade. Economic turnover is most often defined as the exchange of goods and services between market participants and the legal effects of this exchange. The security of economic transactions consists, among others, in ensuring equal opportunities and operating conditions. It is a desirable state in which conditions cannot be changed, when time cannot adapt to them, and economic entities cannot be treated unequally.

The principle of certainty and security of trading is considered to be one of the fundamental principles of private law. The principle of safe trade plays a particularly important role in professional trade, due to the strengthening of consumer protection at the expense of certainty of trade in the sphere of consumer relations. It is derived from a number of institutions of the legal system. Examples of the implementation of this principle are: land and mortgage registers, public registers, the requirement of a specific form of legal transaction, liability for *culpa in contrahendo*, the concept of contractual penalty. This principle is strengthened by the interference of criminal law, including the regulations contained in Art. 304 of the Penal Code. Behind the criminalization of crimes against economic turnover is the broadly understood social interest, understood both as the interest of the state budget and the private sector. Hence, an unambiguous and decisive reaction of the legislator aimed at the protection of properly functioning economic transactions.

Table 1. Own study based on police statistical data

Art. 304 P.C. – statistics										
Year	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
<b>Number of initiated proceedings</b>	21	29	43	46	30	32	49	41	44	38
<b>Number of identified crimes</b>	13	15	21	170	158	40	3	39	77	25

Source: ([www.policja.gov.pl](http://www.policja.gov.pl), 20.09.2022).

The statistical data provided on the official website of the Police do not fully present the legal situation related to the crime related to the commission of the crime of usury on a national scale under Art. 304 of the Penal Code. First of all, it should be noted that they

do not provide data after the amendment introduced by the Act of May 14, 2020 on the amendment of certain acts in the field of protective measures in connection with the spread of SARS-CoV-2 virus, as they end in 2020, while pointing to the original wording of Art. 304 of the Penal Code. Therefore, it is not possible to assess how the change in the provision influenced the number of committed offenses of usury, in all its varieties. As for the evaluation of data collected in previous years, i.e. from 2011 to 2020, it can be assumed that this is not a crime characterized by a large number of conducted and completed criminal proceedings.

#### 4. CONCLUSIONS

Extending the field of criminalization of usury in Art. 304 § 1 of the P.C. by the possibility of recognizing a benefit as a disproportionate one, did not increase the number of reports by the aggrieved party and did not contribute to the enhancement of criminal law protection. This may give rise to the assumption that the reason for the unchanged number of proceedings lies in the too generally defined features of the prohibited act. This applies in particular to the feature of disproportionate consideration, which is one of the assessment criteria considered in judicial decisions on the basis of specific factual states, which necessitates linking it with the type of turnover, the type of basic benefit and the related mutual benefit (Pastora, 2019). The lack of gradation of disproportionate by the legislator means that it is not possible to limit this characteristic by adopting gross disproportion or obvious disproportion. A similar situation occurs when the victim must be in a forced position and the perpetrator exploits this position, which results in limiting the application of this provision to the minimum necessary in terms of criminal law protection. The problem is primarily the fact that, although forced positioning is an objectified category of economic nature, it is not universal in nature and, moreover, does not take into account the subjective side, namely the mental state of the aggrieved party. Therefore, it seems that it would be advisable to extend the features of the forbidden act of usury to the intellectual capacity of the aggrieved party, apart from the compulsory position treated objectively.

On the other hand, the amendment of May 14, 2020, introducing two new types of usury crime, whose task was to protect consumers, i.e. natural persons who do not conduct business activity, who have concluded contracts with entrepreneurs, against the so-called users. While the very genesis of introducing this type of additional liability has been recognized by the legal doctrine, the solutions contained therein, and in particular the manner of introducing the new provisions of the Penal Code into legal circulation, raises doubts, primarily related to intertemporal issues. The provisions of Art. 304 § 2 and 3 of the P.C. have been introduced, which has already been provided for in the regulations included in the so-called anti-crisis shield (so-called shield 3.0.), related to protective measures in connection with the COVID-19 pandemic, and it seems that the criminal anti-usury provisions have a broader scope of action and the justification for their introduction is not directly related to the pandemic, which is indicated in particular by the fact that they are not of a temporary nature limited to the period of combating the negative effects of this pandemic, but have been introduced into the legal system on a permanent basis (Giezek, Lipiński, 2020). Doubts regarding the application of criminal liability under Art. 304 § 2 and 3 of the P.C. However, it raises the question of whether these provisions apply to cases in which the unlawful demand for payment of interest or non-interest costs took place after

the entry into force of the above-mentioned of the amendment, but in relation to receivables resulting from contracts concluded before its entry into force. The prevailing position is that the indicated proceedings are subject to the criminal law regime under these provisions, but there are also opposite opinions (Giezek et al., 2020).

However, the following are not criminalized, in particular: 1) behaviors that will be related to the use of the special condition of the person receiving the benefit, 2) all factual states in which, through concealment, there will be an erroneous perception of the amount of consideration, 3) actions that will lead to mutual benefit many times in excess of the original benefit and behavior that will lead to a significant deterioration in the economic situation of the party, if the original beneficiary was not in a compulsory position, 4) intermediation.

In conclusion, in this connection, it would be worth considering the introduction of the following crimes: 1) professional usury activities, (in connection with the state of knowledge, the possibility of assessing the situation by the primary beneficiary, at the time the service is provided by the service provider), 2) an intermediary. What follows is the conclusion that, despite the expansion in 2020 of the criminalization of behavior that constitutes the crime of usury under Article 304 of the Penal Code, the criminal law still does not guarantee full protection of economic turnover from the dangers arising from the reprehensible behavior of its participants engaged in usury activities.

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## ORGANIZATIONAL CULTURE IN REMOTE WORKING CONDITIONS – HOME OFFICE

The Covid-19 pandemic has complicated business activities at various levels, primarily in terms of work organization. The objective of this research is to determine the significance of organizational culture for employees working in home office conditions. What values and amenities, previously preferred in a company, are missing for employees in remote working conditions at home (RQ1)? Which values of organizational culture were predominant during remote work, playing an important role in home office conditions (RQ2)? Which were lacking (RQ3)? To analyze the above issues, this article used both secondary studies of national reports examining remote work, and the author's pilot study using an online questionnaire. The research results indicated that remote work during the Covid-19 pandemic, in most cases, did not neglect the key values of organizational culture and the involvement of employees. The biggest problem turned out to be cultivating the values primarily responsible for building trust, honesty, and respect, as well as communication and motivation.

**Keywords:** organizational culture, remote work, home office, COVID-19.

### 1. INTRODUCTION

The COVID-19 pandemic is and will be of great significance for the future of the global economy. It is also a breakthrough period, changing the existing paradigms in human relationships, health protection and hygiene. Most organizations have had to face an unprecedented situation, i.e., the need to maintain the continuity of the conducted activity while securing the health and life of employees, the consequence of which was a range of changes, including significant transformation of organizational cultures (Kniffin et al., 2020). It seems that the core values and assumptions of many organizations have changed in favor of maintaining security and consistency of operations. This deep transformation was a major challenge to managers (Kniffin et al., 2020). They wondered in what direction the company's culture has evolved, when most employees worked from home (Howard-Greenville, 2020). Although modern technological solutions potentially allowed for the accomplishment of the organization objectives by providing work in the form of remote work, this non-standard way of performing work was not however irrelevant to the operation of individuals, and primarily for their mental well-being. Not everyone coped equally well in social isolation, primarily, the need for affiliation or direct relations with the

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employee group was a clear problem for many employees, which was evidenced by the ClickMeeting research (2021). Modern technology has created a great opportunity to change the approach to work and remote work has become the fact, whether we were prepared for it or not. For organizations having and managing virtual teams, or teleworkers, transition to home office was nothing new and surprising, but it was worse for those who had not dealt with this form of work before. Moreover, the pandemic highlighted deficiencies in the equipment of workstations in terms of IT infrastructure and their operation, which quickly verified the level of the organization development. Remote workers need a virtual digital working space with technology that makes communication, cooperation, and access to information as easy as in the office. Another problem became maintaining organizational culture and the need to modify it for home office working conditions (Olearczyk, Walewska-Zielecka, 2021). The results of the previous research indicated that organizational culture affects the involvement and satisfaction of employees in the organization (Belias, Koustelios, 2014). In the present circumstances of the post pandemic reality of COVID-19, scientists want to know if organizational culture still influences the involvement of the organization and how it has changed over several months of social isolation. This paper will help to fill this research gap. Therefore, the objective of this research is to determine the significance of organizational culture for employees working in home office conditions. This and, particularly the significance of organizational culture during remote work and its preferred values and principles are the content of the following article.

## **2. REVIEW OF LITERATURE AND NATIONAL REPORTS**

### **2.1. Remote work in home office conditions**

In an informal language, remote work is often replaced with an English-speaking term – home office, although it is only one of possible forms of performing work remotely (Szluz 2013). In the article, the term of remote work will be used in the context of home office. According to literature, the terms of remote work and telework are often identified with each other and used interchangeably. However, some researchers (Sęczkowska, 2019; Dolot 2020) point out that telework relates to work performed from home under a contract of employment, while remote work refers to work done under a contract of employment of civil-law contracts or self-employment. Telework allows employees to perform their duties and responsibilities from the location outside their seat, other than the official workplace. This may include work at home, another division, a coffee shop, a bookshop and even a coworking space. Although they are often outside an office, a teleworker is different from a remote worker since sometimes in-person presence in an office is required, although this is not always the case. Another key difference is that a teleworker is often geographically closer to the head office than a remote worker. Additionally, it is worth referring to the Polish Labor Code, which does not include legislation on remote work, the only related form of providing this type of work is telework. In the light of the law, “work may be performed regularly outside the workplace, using electronic means of communication within the meaning of the rules on the provision of services by electronic means (telework)” (Kodeks pracy, art. 675 par. 1 – The Labor Code, Art. 675 paragraph 1). Hence it is believed that the criterion of regularity and repetition is crucial to distinguish remote work from telework (Dolot, 2020; Wróbel & Jendza, 2018). Nowadays, remote work is possible under the so-called Covid Act of 2 March 2020. It states that in order to counteract Covid-19 the



employer may order the employee to perform work for a specified period of time outside the place of its permanent performance (remote work) (Raport “Aspekty pracy zdalnej z perspektywy pracownika...”). The term of remote work should therefore be used when it is performed only occasionally or periodically as was the case of the Covid-19 pandemic. Nowadays, the Polish government has decided to start work aimed at regulating the rules of remote work in a more comprehensive way than telework.

And so, while some companies offered an opportunity of working from home as an add-on, it has become a standard for most businesses now. Many workers enjoyed the freedom and flexibility of remote work, particularly at home, coworking spaces or other places outside the office. It is true that employers also did and still do benefit from remote work due to reducing the needs and costs related to real estate in the workplace, and broader, more flexible opportunities for talent acquisition. The research by the Antal (Raport Antal, 2021) indicates that employers rate the efficiency of remote work very highly – in the opinion of 92% of them, it is good or very good. Companies are also happy to reduce the cost of business travel (81% of positive indications) and to maintain the level of remuneration (71% of positive indications). Integration and cooperation (35% of negative indications) and onboarding of employees (29% of negative indications) are rated the worst. Recruitment of employees (16% of negative indications) also seems to be a big challenge (The Report on the Remote work aspects from the perspective of the employee, the employer, and the economy of 2021). However, psychosocial issues, among others, related to people’s motivation to work, building positive interpersonal relationships or precisely related to the observance and respect for organizational culture during remote work have become problematic. Undoubtedly, this situation requires a deeper analysis and consistent operations. Although the year of 2020 can be considered the year of remote work, the observers assume that this is only just beginning since the continuation of this trend is already visible in the coming years. The Gartner CFO study indicated that more than two-thirds (74%) are planning to permanently transfer employees to remote work after the end of the Covid-19 crisis. It is estimated that 70% of the labor force will work for at least five days a month by 2025 (the study by ETR – articles from Reuter and Forbes).

## 2.2. Home office and organizational culture

Culture is perceived as a more or less coherent system of meanings and symbols within which there is social interaction, it refers to the common views of employees concerning what is important in the workplace and how to behave in it. According to Pettigrew (1979), culture ought not to be perceived as a uniform concept but just a set of terms including “the symbol, language, ideology, belief, ritual and myth”. Schein (2004) notices that organizational culture is co-experienced by the employee group during various situations. Fundamentally, he defined organizational culture as a pattern of common basic assumptions the group has learned when solving problems connected with external adaptation and internal integration and these patterns have operated well enough to be considered to be right, and thus to pass them on to new members of the company as a pattern of the right way of perception, thinking and feeling in relation to these problems. Moreover, according to Schein, there are three levels of organizational culture: artifacts, standards and values and basic assumptions. The values are to reflect the common perspective of what strategies the organization should take, and what its objectives should be (Kwantes, 2015). This common set of perspectives is often communicated using symbols which carry the common meaning in the organization (Alvesson, 2012; Weber, Dacin, 2011)). According to the definitions of

organizational culture, it primarily concerns the shared parts, i.e., views, ideologies, values, convictions, expectations, and standards (Hofstede, Hofstede, Minkov, 2011; Bisbey et al., 2019). The physical transmission of these elements in most enterprises has played an important role in the whole of organizational processes. In the home office working conditions, this process was disturbed, most of all, in terms of the reception of all physical and behavioral artifacts difficult to transfer into the virtual world, such as, any rituals and ceremonies which do not strengthen employees' involvement with no physical contact. It was precisely the changes in access to organizational culture that caused employees' longing for previous experiences of office work. Therefore, informal employee contacts and precisely the lack of their compensation during social distance were disturbed. There were also visible transmission disturbances within the so-called basic assumptions, i.e., the least visible area of organizational culture but laying the foundations for the whole organization, which is responsible, among others, for the sense making of the cooperation in the company (Dolot, 2020; Sęczkowska, 2019).

Social distance has brought therefore inevitable consequences associated with employees' moving away from organizational culture and daily management requires new models of involvement of groups creating the organization. The main functions of organizational culture, in difficult times, was the one related to the adaptation to the changing external conditions, and thus it played a major role in the context of the crisis. For this reason, companies switching to a remote mode in the crisis conditions had to consider employees' distance to their organizational culture as another risk factor (Paprocki, 2020).

It was clear that, from the beginning of the pandemic, many issues required immediate action so as not to lead to long-term downtime in business. On the other hand, the issues associated with the appropriate motivation of employees to work, stimulating their involvement or taking care of organizational culture remained for further consideration and actions by managers, which does not change the fact that their importance for business is enormous. However, in the first place, the transition to a remote work mode required operations without which this form of work could not exist, e.g., preparing IT infrastructure or access to the Internet. The conditions of remote work are characterized by high flexibility of work, the possibility of providing work from anywhere in the world, lack of daily direct contacts with coworkers, dependence of working time on the needs of the organization, and on rapidity and efficiency of the employee's operations, self-regulation of working time. This is where organizational culture should play the greatest role. If, prior to the pandemic, specific values were crucial to companies, it is certain that some of them have lost their freshness over the last nearly three years. Therefore, in the paper I try to answer what values and amenities, previously preferred in the company, are missing for employees in remote working conditions at home (RQ1) and what values of organizational culture were leading during remote work and played an important role in home office conditions (RQ2) and which they were lacking (RQ3)? It is only when each of the adopted values meets all these criteria, we can talk about good organizational culture (<https://www.prawo.pl/kadry/kultura-...>).

Based on the analysis of secondary studies, RQ2 can be partially answered. The values previously promoted in the work environment concerning at least mutual loyalty, trust, involvement, and collaboration with no limits in the transfer of knowledge must have contributed to an easier transition to the home office work mode. According to the research conducted by Mercer, the consulting company dealing with human resources, 94% of employers stated that the performance of their employees was the same or higher than

before the pandemic, even if their employees worked remotely (<https://edition.cnn.com/2020/08/27...>). Meanwhile, many managers or companies' owners were mentally reluctant not to have total control over what their employee was doing at any time. During the pandemic employees particularly appreciated employers who provided them with a sense of *security* and *stability*. Responding to RQ1: there is still a significant group of people who stated they *felt abandoned*. 20% of the respondents from Poland *had no* sense that their superiors *trusted* them to perform their duties working from home with no need for intensive supervision. Moreover, as much as 52% *felt underappreciated* and only slightly less than half state that their achievements during remote work were *adequately observed* (48%) (<https://www.egospodarka.pl...>). However, it is worth noting that, in the office environment, a positive attitude and strong relationships open the door to promotion. One of the drawbacks of remote work is that it is more difficult to highlight one's own professional achievements. In the subsequent post pandemic years employees will have to put an additional effort into a virtual increase in involvement to ensure they have access to new opportunities and to be identified by employers as a unique employee and leader when working at home. The lack of trust and faith in the abilities of employees is rather unlikely to occur in organizations with strong cultures as previously promoted and established organizational values had led there to the creation of the consistent, close-knit, and involved working environment. The companies in which managerial staff do not trust their employees find it very hard to operate and succeed in the remote work mode where the possibility of this control, due to obvious reasons, is limited. Employees, for whom excessive supervision by their superiors may just hinder the performance of daily duties and discourage them from working efficiently, are also aware of that.

Despite the general satisfaction with the freedom of remote work and performing it at home, on numerous occasions, it also happened that employees were required to be practically available 24 hours a day (Sęczkowska, 2019). This led to a complete *imbalance between private and professional life* (RQ1). Normalization of this type of behavior of superiors required some time, but most of all, the establishment of new procedures, rules, and principles of work, i.e., reevaluating organizational culture itself. The research by Labor Market Monitor indicates that, in the remote work mode, the actual working time extended (RQ1). 43% of people who work remotely, wholly or partially, work overtime more frequently than prior to the pandemic, 47% – replies to business e-mails outside working hours more often than prior to the pandemic, and 34% – answer business phone calls outside working hours more frequently than prior to the pandemic (RQ1) (Randstad, 2021; Monitor Rynku Pracy).

That the new reality also forced the changes in the organization culture and its ordering, but it brought about savings and increased productivity as well. Managers, after dealing with organizational issues concerning work in the home office mode, finally took care of the appropriate facilities in terms of forming organizational culture, conducive to the process of integration of dispersed employees and implementation of the knowledge codification strategy (Randstad, 2021; Monitor Rynku Pracy). The fact is that the organization of remote work caused many difficulties in the processes of forming organizational culture. The development of one coherent pattern of behavior, standards and values was hindered by a very high dynamics of the structure, frequent changes in team members, their roles, and high diversity (RQ3). Therefore, managers in charge of the team working in home office conditions sought to build a cooperative organizational culture. The dominant values in this culture are synergy, egalitarianism, and harmony, while leadership

oriented to coaching, mentoring and teamwork, also in a remote company, would bring benefits to both parties (Kozmiński, 2008) (RQ2). Managers also sought to promote a competence culture, preferring the values, such as, professionalism, innovativeness and competition between individuals and groups. There is an exchange of knowledge and information here, aimed at increasing the level of effectiveness. Competence cultures are open to innovativeness and using new tools and technologies in achieving the objective (RQ2).

It is also worth pinpointing that another value which definitely gained in importance during the pandemic was *openness in communication*. Employees became to demand clear, factual, and reliable information from employers. The relationships between the superior and employees are very important not only for themselves but also the entire company. Individual studies show that almost everyone noticed the impact of the pandemic on interpersonal relations, including those in the working environment. According to the results of the analysis by the Antal company, 65% of the respondents noticed the weakening of relationships in the working environment, 54% experienced difficulties in external and/or internal cooperation, and 32% – a decrease in the effectiveness of cascade communication in the organization (RQ1) (Raport Antal, 2021). Although remote work makes it difficult to contact other employees, team members and managers, according to the research results by Hays Poland, 76% of the respondents positively assess their relationships with their bosses and appreciate their efforts during the pandemic (Hays Polska, 2021) (RQ2). In turn, 48% of the respondents believe that the lack of direct supervision and remote contact with their boss translates into higher efficiency of work (RQ2) (ClickMeeting, 2021).

Regardless of the degree of employers' attitude to remote work and benefiting from it, it should be acknowledged that *the flexible approach of employers to work* is gaining in importance; it is particularly visible when considering the decision to return to office work. Both global companies and small local entrepreneurs implement a hybrid work model for this purpose, recognizing the advantages of enabling their employees to make their own choices (RQ2). On the other hand, dynamic technological development, process automation and growing mobility of society indicate that more and more employees will decide on remote work, also full-time. Wishing to remain an attractive employer in the market, enterprises ought to consider this aspect in their employment strategy and respond to the needs of employees (Sapta, Muafi, Setini, 2021).

However, the willingness to work in the remote or hybrid mode cannot be generalized to the same extent in all cases. Unfortunately, remote work is not an ideal solution for all employees since it requires a very good organization of working time, independence, self-discipline, and abilities to dictate the right pace of work. After providing the employee with an opportunity to use home office, it is worth therefore regularly raising the issue of satisfaction with such a solution with them. It happens that, for some people, this form of work turned out to be tiring, stressful or ineffective in the long run (ClickMeeting, 2021). Then, it is worth considering whether a better solution would be to make working time more flexible in the form of flexible hours to start it.

In addition, there are housing conditions which are often not conducive to the home office work. The data by Eurostat indicates that 39% of Poles live in overcrowded apartments in Poland (the EU average is 16%). As a result, during the first lockdown 42% of working parents declared that they had no possibility of adequate isolation while working remotely. The transition to the home office mode is also the separation of the workplace in the home space. The problems related to the penetration of personal life

of employees through occupational issues and shifting the boundaries of employees' responsibility became apparent. The prevalence of these problems increased an interest in the scope of employers' responsibility for jobs in the new home dimension (<https://centrumcyfrowe.pl...>).

To sum up the above considerations, (and partially responding to RQ1, RQ2, RQ3 based on secondary research) it is necessary to highlight the significance of organizational culture during remote work at home, its constant strengthening is required. In the struggle to stay in the market in times of crisis, it is easy for employees to forget the values and principles preferred by the specific organizational culture and it is important here for leaders to remind themselves and other team members that values should never be sidelined. Each decision made by the company ought to be in line with its values. Otherwise, values will only be perceived as "only words" and culture will fall apart. Only reminding team members of values is essential for maintaining strong culture (<https://about.gitlab.com...>).

### 3. OWN RESEARCH

#### 3.1. Research methodology

The research was conducted among 131 respondents from January 2022 to May 2022 using the CAWI method. The research was a pilot study. The respondents were requested to complete the online survey questionnaire. 93% of the respondents was part-time students of Faculty Management, Czestochowa University of Technology. The study was intended only for people working remotely, the research group was selected from part-time students (93%), and then a link to the study was provided to them. The remaining 7% of the respondents are people who are connected with the first research group (family, friends) who expressed their willingness to participate in the research.

The objective of the study was to determine the importance of organizational culture for employees working in home office conditions. The conducted own research provides answers to the following questions: what values and amenities, previously preferred in the company, are missing for employees in remote working conditions at home (RQ1) and what values of organizational culture were leading during remote work and played an important role in home office conditions (RQ2) and which they were lacking (RQ3)? The overall satisfaction with work in home office conditions was also evaluated. The characteristics of the respondents are presented in Table 1.

Table 1. Characteristics of the respondents (%)

Age	Under 25	25–40	40–55	Over 55
	33	49	13	5
Gender	Female	Male		
	62	38		
Education	Secondary	Higher (I and II degree)		
	78	22		
Place of residence – towns/cities:	Below 50 thousand inhabitants	50–500 thousand inhabitants	Over 500 thousand inhabitants	
	16	79	5	

Source: Author own studies.

### 3.2. Results

#### 3.2.a. Results RQ1

In the first place, the respondents were asked about trust in their superiors while working remotely at home, 78% replied positively, the others did not feel trust. The question provided an opportunity to supplement the response with the reason for the lack of trust and here some explained that they had never trusted their superiors, even prior to the pandemic and others explained this with the disorganization of work and fear for what next with their work from the moment of the outburst of the pandemic, noticing the helplessness of their superiors in the face of new working conditions. It also seems that for this and other reasons the respondents also emphasized a great sense of stress while working remotely at home (39%), 61% did not feel stress. This rather low perception of stress relates to another question, i.e., do you feel satisfaction with work in home office working conditions? As much as 82% responded “yes”, 10% responded “no”, and 8% had no opinion in terms of this issue.

The subsequent questions related the issue of working conditions in the home office mode (Table 2).

Table 2. Working conditions in the home office mode

Questions:	YES	NO
Did the employer prepare you for work in home office conditions, i.e., provided tools, software, communicator, conducted training in terms of their use?	67%	33%
In case of problems with the above-mentioned tools, could you count on the support and help of superiors?	85%	15%
In case of problems with the above-mentioned tools, could you count on the support and help of coworkers (colleagues)?	72%	28%

Source: Own study.

The above indicates that the situation of the respondents, in terms of the preparation for work in home office conditions was quite good, in most cases, they were provided with IT infrastructure, including training by employers/superiors. The respondents always had an opportunity to comment under the responses ticked, in that case some supplemented their response to the first question from Table 2 with a note that the conditions for work at home were provided to them but after some time from the beginning of the pandemic. This required some thoughts and considering the related organizational and financial issues. 37% indicated receiving an equivalent for preparing independently the workplace at home. On the other hand, the result of 85% of indications of receiving help from superiors in terms of support when experiencing problems with tools at work is satisfactory (listed in question 1 in Table 2). It was slightly worse (although 72% of positive indications is a satisfactory result) with assistance and support from coworkers. Some respondents, in comments, explained their unwillingness to help others with the overload of work, other home duties, i.e., support during distance learning of their children, hence a limited time to help colleagues.

Subsequently, the respondents were asked about problems with the organization of their own time while working in the home office mode. 62% had no problems with that, the

others, i.e., 38% indicated problems in this area. The respondents did not leave comments for the negative response; however, it may be assumed that this was due to self-discipline and own motivation, which will be explained in the next question.

### 3.2.b. Results RQ2

When moving to the essential research of organizational culture in home office conditions, the respondents were asked: do you think that, during the pandemic and remote work, organizational culture suffered? The obtained responses did not provide an unequivocal solution, i.e., 34% of the responses is “yes”, 36% of the responses amounts to “no” and 30% is “don’t know”. The respondents reacted slightly differently to the question: what values of organizational culture were the leading ones for you while working remotely and which ones you were lacking? (Table 3 – more than one response possible).

Table 3. The leading values during remote work and their lack during remote work

Values:	Important from the respondent’s point of view	Its lack from the respondent’s point of view
Openness	92%	75%
Trust	96%	72%
Empathy	87%	89%
Understanding	98%	92%
Respect	83%	78%
Involvement	69%	73%
Emotionality	93%	57%
Reliability	66%	68%
Courage	68%	71%

Source: Author own studies.

There are no such large discrepancies between the expected and actual state of the preferred values according to the indications of the respondents (Tab. 3). They primarily pay attention to the values of ‘openness’, ‘trust’, ‘respect’ or ‘emotionality’. While the first two values can be explained by the, generally prevailing in companies, distance to freedom and trust or just openness/honesty towards employees (this requires long-term building of mutual loyalty in employee team), the decline in respect and affection towards employees is incomprehensible.

When asked whether, during the pandemic and remote work, the values, standards, and principles of organizational culture were consulted with employees? a slightly more than half of the respondents (51%) said “yes”, 22% indicated “no” and 27% – “don’t know”. On the other hand, when asked if the values, standards, principles of organizational culture were changed during the pandemic? most responded – “don’t know” – 77%, only 6% indicated “yes” and the other 17% – “no”. The obtained results show a slightly negligent approach of employers/managers to the essence of organizational culture. In the struggle to maintain their market results and to avoid downtime in the implementation of organizational processes during the pandemic, they did not pay enough attention to the issue of cultivating cultural values and norms.

Disregarding the research results obtained above, the respondents, when asked if remote work (home office) can replace traditional working conditions for them, predominantly, i.e., 76% responded “yes”, 15% indicated “no”. and 9% that “yes, but partially”. Considering a greater interest in remote work (home office) by employers themselves, the prospect of hybrid work is highly probable.

### 3.2.c. Results RQ3

The respondents were also asked what they were missing most during remote work, and the responses provided were the introduction to determine negligence or not in terms of organizational culture (Table 4).

Table 4. What were you lacking most during remote work at home?

<b>Issues considered:</b>	<b>YES</b>	<b>NO</b>
Direct contact with the superior	52%	48%
Direct contact with coworkers (colleagues)	70%	30%
Staying in the workplace, i.e., the building, own office, the company's room	48%	52%
Contact with customers	84%	26%
Contact with contractors	79%	21%
Motivation from the immediate superior	54%	46%
Self-discipline	44%	56%
The sense of work performed	32%	68%

Source: Author own studies.

The analysis of the results included in Table 4. indicates that the perceived shortcomings during remote work primarily concerned direct contact with people, especially coworkers, customers, contractors and, furthermore, superiors. This may be the evidence of the limited possibilities of achieving the need for affiliation during remote work, verbal contact with others, including meeting new people and establishing new business relationships. The respondents had also difficulty in terms of poor involvement of superiors in their motivation (54%).

## 4. CONCLUSIONS AND RECOMMENDATIONS

### 4.1. Conclusions

To sum up, it is important for managers to seriously approach the issue of maintaining organizational culture irrespective of the working conditions of employees, i.e., home or traditionally in an office. It seems to be definitely harder during employees' remote work but not impossible. This requires their effort and involvement, searching for new methods and ways of satisfying the needs of subordinates, enforcing the results of operation, and cultivating the most important values in the company to maintain not only the effectiveness and efficiency of operation, but also unity, empathy, and collectivity. The analysis of both secondary and own data showed that employers/superiors in most cases responded to all needs related to remote work (home office) rapidly and remedially, since they bore the greatest responsibility for maintaining the efficiency of the team, however, they slightly neglected the issues of organizational culture. The COVID-19 pandemic forced managers



to the maximum level of concentration and resourcefulness and multitasking. Thus, the most relevant tasks of managers in charge of the team working in home office conditions included (and from the perspective of this difficult time it still does): preparing adequate conditions for remote work, establishing objectives and tasks for team members so that employees can face the challenge of remote work, establishing performance standards so that people know exactly what they are expected, and also promoting organizational culture which strengthens the responsibility of employees and provides critical feedback so that employees know if they do well – and here it was a little worse as well as responding to employees' requests for help, contribution, time and feedback in due time, especially when they need more attention from their superior while working remotely from home is very important (RQ1 and RQ2). Clear communication about objectives, contributions needed, success, problems and opportunities, is equally important, which will also allow employees to build trust in the team. The research showed that this was not a problem (RQ3) but as was also showed, remote work conditions provide limited opportunities in motivation system. Managers should find a way to motivate and integrate the group using online tools and with the help of a business psychologist (RQ3). Identifying employees' motivation stimuli is the issue the most frequently neglected by superiors. Therefore, as far as possible, managers should constantly supervise and build relationships with employees and encourage each team member to actively participate in online meetings, discussions, common sessions of problem-solving. The respondents indicated that managers were a little bit helpless in terms of motivating activities (RQ3). Moreover, as shown by secondary research, distrust and the feeling of abandonment and underappreciated (RQ1 – <https://www.egospodarka.pl...>) have been a serious problem for many employees, which is valid for the motivation and give a sense of belonging to a group of employees.

Besides above, managers ought to help employees in management of their time, in terms of distraction when working in virtual environment knowing that employees share their office space with other housemates and issues such as education and others (RQ1 – based on Randstad 2021; Monitor Rynku Pracy).

#### 4.2. Recommendations

The managers should pay more attention to the socio-cultural working conditions, which in the context of remote work play a key role. They should focus on the fears of employees concerning, e.g., abandonment, underappreciated, or less possibility of development. Regular coaching and development discussions may be conducted here as well as helping employees find virtual events in which they may take part and develop themselves. The way the manager chooses to promote organizational culture during home office work depends on the internal arrangements of the company, however, it is certain that it is an area that cannot be neglected since ignoring it may result in a decrease in the efficiency of employees and, consequently, a decline in the form of the entire company. This is worth considering in future studies.

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## **ANALYSIS OF THE LEGAL POSITION AND ROLE OF INFORMATION SERVICES IN ENSURING THE SAFETY OF MASS SPORTS EVENTS**

This article discusses the legal position of information services, as well as the rights and obligations of their members in the field of security of mass sports events. Designated by the organizers of mass events, information services play an important role in ensuring the safety of participants. Pursuant to the currently binding Act on the Safety of Mass Events of 2009, legislators have granted information services many powers of a preventive nature. This allows them to effectively prevent the possibility of a threat during a mass event. Such actions are also aimed at minimizing possible negative consequences in the event that the danger does occur.

**Keywords:** security, mass sports events.

### **1. INTRODUCTION**

A sense of security is one of the highest and inherent values of every human being's daily existence. Contemporary experiences related to, inter alia, the infectious COVID-19 pandemic caused by the SARS-CoV-2 coronavirus, an armed conflict in Ukraine, as well as a series of terrorist attacks that have taken place since the beginning of the 21st century, are significantly influenced the cited sense of security of societies around the world – with particular emphasis on people living in the countries of Central and Eastern Europe. It is worth emphasizing that the above-mentioned circumstances, both directly and indirectly, negatively affected areas such as the economy (a significant increase in inflation) or the sphere of everyday cultural and sports life for each of us. The long-term inability to derive entertainment from actual participation in mass events (caused by the aforementioned pandemic), followed by the dynamic increase in the prices of basic products, in the opinion of many people, intensified the reduction in the level of sense of security.

The content of Art. 5 of the Constitution of the Republic of Poland, which explicitly indicates that the Republic of Poland is obliged to guard the broadly understood security of its citizens. Such a general and general regulation is the basis for further detailing this issue in terms of the area that is subject to a specific analysis. With regard to the safety of mass sports events, the issue of ensuring safety and public order in connection with the conduct of mass sports events, and thus indicating the entities responsible for it, as well as the rights

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and obligations they are equipped with for this purpose, is regulated by the force of the Act on the Safety of Mass Events of 2009.

Based on the analysis of the content of the above-mentioned act on the safety of mass events in a general way, it should be emphasized that the regulations introduced by the legislator relating to the discussed issues mention a large group of entities that have different rights and obligations to guarantee the safe course of all types of mass events, including mass sports events. Such a multitude of entities allows for a specialist specification of a narrow group of tasks that rest on individual organs. This group includes: the organizer of the mass event, the manager for security of a given mass event, members of the security service and information service who play such a role during a specific mass event, as well as such bodies as the head of the commune, mayor, city president, voivode or uniformed services. such as the Police or the Fire Department. Due to the complexity of the issues of tasks that rest on the aforementioned entities, this article will focus strictly on the legal position as well as on the rights and obligations of members performing the role of the information service.

## **2. SELECTED EXAMPLES OF THREATS DURING MASS SPORTS EVENTS**

In order to show the legitimacy of the functioning of the formation in question, it is worth first of all, based on past experience, to present the characteristics of potential threats that may occur during a mass sports event. When considering this issue, it should be emphasized that in relation to mass events, it is also worth paying attention to the problem of the so-called crowd dynamics, as high density can be a sacrificial factor (Still, 2000).

The first type of danger, which is worth paying special attention to, directly results from the inappropriate behavior of participants in a given mass sports event, namely the phenomenon of stadium hooliganism. The issues related to this phenomenon were particularly noticeable in Poland at the end of the 20th and the beginning of the 21st century, when playing football matches (Jedynak, 2012). At this point, it is worth emphasizing that the inspiration for the Polish legislator to take decisive legal steps to combat the so-called stadium hooliganism resulted, inter alia, from the adoption in 1985 by the Council of Europe – the Convention on the violence and excesses of spectators during sports events, in particular football matches, which entered into force in Poland in June 1995 (Chlebowicz, 2018). In addition to the possibility of citing a very large number of examples of events on this basis, the above thesis is also confirmed by the fact that the legislator decided to regulate the issues related to the safety of football matches in detail in a separate chapter of the Act on the safety of mass events (chapter 3 of the aforementioned normative act). In practical terms, an example of the thesis adopted may be the recent events that took place during the football match of the 1/32 final of the Fortuna Polish Cup between the teams of Ruch Chorzów and Górnik Zabrze, which took place in Chorzów on September 1, 2022. Improper and aggressive behavior of hooligans (e.g. destroying the gate at the stadium or burning the opposing team's flag) led to a decisive intervention by the security, and later also by the police. To make matters worse, at the end of the match, some hooligans also entered the pitch, which forced the referee to stop the competition temporarily (<https://przegladSPORTOWY.onet.pl/pilka-nozna/puchar-polski/ruch-gornik-wielkie-derby-slaska-w-cieniu-starc-pseudokibicow-z-policja-wideo/pj3ckzv> (Access: 6.10.2022).

Another threat to the security of a mass sports event is related to the possibility of a terrorist attack aimed directly at the participants of such an event. As shown by past

experiences, compared to other countries, such events have not taken place on a large scale in Poland so far – which does not mean that in the context of the future (also due to the armed conflict taking place beyond the eastern border of Poland) such a risk does not occur. Exists (Wiśniewski, Socha, Gracz, 2010). An infamous example of a terrorist act committed during a sports event may be the attack that took place during the Boston marathon. It was on April 15, 2013, during the Boston Marathon, two bombs exploded, the detonation of which killed three people (including an eight-year-old boy) and seriously injured over 260 other people (<https://www.history.com/topics/21st-century/boston-marathon-bombings> (Access: 6.10.2022)).

The last presented type of danger that can potentially occur in connection with the organization of a mass sports event relates to the inappropriate and irresponsible behavior of the organizer. The example of the events that took place in Furiani (France) in 1992 can serve as the confirmation of this opinion. It was on May 5, 1992 that the semi-final match of the French Cup was to be played between the second-tier team S.C. Bastia and Olympique Marseille (at that time the champion of the French league). The popularity of the team from Marseille became a pretext for the rulers of the S.C. Bastia club to temporarily expand the stadium, which would allow for an increase in the number of spectators by about 2,500 people, which would directly contribute to the club's gaining higher financial revenues from the sale of tickets for the match. Unreasonable rush and leading to such bizarre situations as, for example, carrying out the last works in the form of tightening the screws or welding the structure, when most of the fans were already on this stand, resulted in a tragedy that took place even before the match began. An unpleasant effect of the present proceedings of the organizer of the football match in question was the collapse of the aforementioned structure of the temporary stand, which resulted in the death of 19 people and more than 2,300 injuries ([http://stadiony.net/aktualnosci/2022/05/francja\\_30\\_lat\\_od\\_tragedii\\_na\\_stadionie\\_bastii](http://stadiony.net/aktualnosci/2022/05/francja_30_lat_od_tragedii_na_stadionie_bastii) (Access: 6.10.2022)).

The above-mentioned examples of various types of threats that may occur in connection with the organization and course of a mass sports event prove that the entities responsible for ensuring safety during such mass events should be comprehensively and professionally trained and at the same time equipped with a number of rights and obligations enabling the effective performance of its tasks. One of such entities in the Polish legal system are information services. Their legal position and competences have been regulated in detail in the Act on the Safety of Mass Events (hereinafter referred to as u.b.i.m.).

### **3. DEFINITION OF A MASS SPORTS EVENT AND THE LEGAL STATUS OF INFORMATION SERVICES**

In order to analyze the legal position and tasks of the information services in connection with the organization of a mass sports event, it is first appropriate to define the statutory scope of the definition of a mass sports event. When analyzing the content of art. 3 u.b.i.m. It is worth paying attention to the fact that the legislator did not directly define the concept of a mass event – only pointing out that this term should be understood as a mass artistic and entertainment event and a mass sports event – including a football match (Fundowicz, 2013).

In view of the above, it is appropriate to focus directly on the regulation contained in Art. 3 point 3 of the Act on Laws, in which the legislator indicated that a mass sports event

is a mass event the purpose of which is to compete in sports or to popularize physical culture, organized at:

- a) a stadium or other facility that is not a building, where the number of places provided by the organizer for people, determined in accordance with the provisions of the construction law and fire protection regulations, is not less than 1000, and in the case of a sports hall or other building enabling a mass event - at least 300;
- b) the area enabling the conduct of a mass event, where the number of places made available by the organizer for people is not less than 1000.

In order to complete the definition of a mass sports event, it is worth emphasizing that the legislator in Art. 3 point 4 u.b.i.m. decided to regulate the concept of a football match as a mass sports event in a separate manner, the purpose of which is to compete in the discipline of football, organized at a stadium or in another sports facility, where the number of places made available by the organizer for people, determined in accordance with the provisions of the construction law and regulations concerning fire protection, is not less than 1000. The aforementioned separation results directly from the unpleasant experiences that, in the context of the phenomenon of stadium hooliganism, took place on a large scale at the end of the 20th and the beginning of the 21st century during football matches in Poland. For this reason, it is also reasonable to associate the above issues with the concept of a high-risk mass event. This status is given to mass events during which, according to the information on anticipated threats or the previous experiences of the participants' behavior, there is a fear of acts of violence or aggression (Act 2009, art. 3, point 5). It should be noted that granting a mass sports event the increased risk status generates additional conditions which, in the area of safety, must be met by the organizer and other entities responsible for ensuring safety during its duration. In practice, it is football matches that are mass sports events of increased risk, which is conditioned by the emotions that are generated among fans in connection with sports competition (Suski, 2014).

Therefore, the role that has been entrusted to members of the information service during mass sports events is one of the most important aspects affecting the security of its participants. The legal position of the information service was pre-determined under Art. 3 point 12 u.b.i.m., according to which it should be understood as persons reporting to the safety manager, appointed by the organizer of the mass sports event, including the announcer of the sports competitions. When analyzing the legal status of the information service with regard to the safety of mass sports events, particular attention should be paid to the person of the sports event announcer, whose role in this area is particularly important. As accurately noted by C. Kałol – a person acting as a sports announcer should be aware that his behavior, the way of encouraging fans to support the team or the presented attitude towards the players and fans of the opposing team may have a calming effect or provocative (Kałol, 2012).

In order to determine the legal position of the information service, it is also appropriate to indicate that the requirements to be met by its members were defined pursuant to the Regulation of the Council of Ministers of August 30, 2011 on the requirements to be met by the security manager, security services and information services. The basic condition is to complete a specialist training and then successfully pass an internal exam, which consists of a written knowledge test and a part that checks practical skills, as a result of which the training participant receives an appropriate certificate for an indefinite period. In addition, members of the information service should be marked with an identifier while performing their official duties, as well as uniform clothing with a reflective inscription on the back



„INFORMATION SERVICE” (Kurzępa, 2020). It is also worth mentioning that pursuant to Art. 21 paragraph 2 u.b.i.m. the aforementioned badge is issued by the organizer of a given mass sports event and contains the following information: name of the exhibitor, identification number and facial image, expiry date, as well as the exhibitor's seal and signature.

#### 4. RIGHTS AND OBLIGATIONS OF INFORMATION SERVICES

After indicating the legal position of members of the information services, it is appropriate to present the tasks and competences of these entities in connection with the organization of a mass sports event. Based on the generally worded art. 19 paragraph 2 u.b.i.m. you can find out that members of the information service act for the safety of participants in a mass event, in particular by informing them about the adopted organizational solutions. At this point, it is worth paying attention to the term “informing about the adopted organizational solutions”, as this action may have a two-fold preventive character. First of all, it minimizes the possibility of various kinds of possible threats or, in other terms, to prevent further escalation of the danger that has already occurred during a mass event.

In subsequent regulations of the Act on the Safety of Mass Events, the legislator decided to clearly distinguish the group of rights that rests with the entity in question from the group of obligations imposed on it. Moreover, while the legislator separated the scope of duties of the information service (Article 22 (2) of the BFA) from the scope of the duties of the security service (Art. 22 (1) of the BFA) in separate regulations, the issue of the rights of these entities was treated as a common, not separated catalog of competences.

The statutory powers of the information services include (Art. 20 (1) of the BFA):

- 1) checking and confirming the rights of people to participate in a mass event, and in the case of lack of such rights – summoning them to leave the mass event;
- 2) identification of persons in order to establish their identity;
- 3) viewing the contents of luggage and clothing of persons in the event of suspicion that these persons are bringing or possessing weapons, other dangerous materials, explosives, pyrotechnic products, alcoholic beverages, intoxicants or psychotropic substances;
- 4) issuing order orders to persons disturbing public order or behaving inconsistently with the rules of the mass event or the rules of the facility, and in the event of failure to comply with these orders – summoning them to leave the mass event;
- 5) capture, in order to immediately transfer to the Police, persons posing a direct threat to the goods entrusted to protection and persons committing prohibited acts.

It is also worth emphasizing that pursuant to Art. 20 paragraph 4 information services are obliged to perform the above-mentioned activities in a manner ensuring respect for human dignity and other personal rights of the person against whom they were undertaken.

Focusing on the powers of the information services to guarantee safety during mass sports events, it should be indicated that they are autonomous in nature and apply only to cases that occurred at the place of the mass event. This means that they cannot be extended by other rights, such as those of the Police Act – policemen who also take part in ensuring order at a given mass event at the same time (Kotowski, Kurzępa, 2012).

As has been mentioned before, the legislator has defined in a separate manner (Article 22 (2) of the Act on Public Procurement Law) the obligations which, in connection with the

organization of a mass event, rest on members of the information service. Namely, the information services are obliged to:

- 1) informing about the amenities and safety requirements specified by the organizer or emergency services;
- 2) informing about the location of medical, gastronomic and sanitary aid points;
- 3) supervising the safe entry and exit of people participating in the mass event;
- 4) not allowing people participating in the mass event to places not intended for the public;
- 5) immediate reaction to incidents and threats and taking necessary remedial actions, in particular by informing law enforcement services about them;
- 6) observe all areas of potential danger and prevent excessive density of people;
- 7) to ensure compliance with the provisions of the facility (area) regulations and the rules of mass event;
- 8) responding to complaints submitted by persons participating in a mass event.

When analyzing the scope of duties of the information service, once again the preventive nature of the tasks entrusted to it should be emphasized. It is visible through the use of terms such as „informing”, „guarding”, „observing” or „supervising” by the legislator. At this point, however, one should agree with the view of M. Dróżdź, who rightly points out that the duties of the information service regarding the safe entry and exit of people participating in a mass event assume the nature of only control, not supervision (Dróżdź, 2020), because supervision is both the possibility of controlling a supervised entity and also the legal possibility of binding to influence the supervised entity (Ura, 2021).

Approximated and analyzed rights and obligations that the legislator gave to members of information services in the context of ensuring safety during mass sports events, allow to assess that they are the result of experiences gathered over the last several decades, as well as observations of contemporary problems related to the organization of mass sports events.

## 5. SUMMARY AND CONCLUSIONS

Guaranteeing safety during mass sports events is one of the most important challenges faced by entities that have been equipped with a number of competences on this account. Due to the fact that pursuant to Art. 5 sec. 1 u.b.i.m. it is the organizer of a mass sports event who is primarily responsible for the correctness of its course, it should be noted that for this purpose to directly protect public order and security of a given mass event, he appoints an information service and a security service (Pomykała, 2010).

As indicated in the content of the article, the legislator directly regulated the qualifications required by members of the information service. In addition, the powers and obligations developed on the basis of past experience, and then granted by the Act on the safety of mass events, allow us to conclude that their practical application allows for ensuring the participants of mass sports events both awareness of care for the safety of fans, as well as creating a sense of comfort resulting from professional organizational knowledge to be demonstrated by members of the information service.

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- Act of April 6, 1990 on the Police (i.e. Journal of Laws 2021, item 1882).
- European Convention on the violence and excesses of spectators during sports events, and in particular football matches (Journal of Laws 1995, No. 129, item 625).
- Act of 20 March 2009 on the safety of mass events (i.e. Journal of Laws 2022, item 1466).
- Regulation of the Council of Ministers of 30 August 2011 on the requirements to be met by a security manager, law enforcement and information services (i.e. Journal of Laws 2017, item 1347).

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## EXPLORING FACTORS PREDICTING WOMEN'S PARTICIPATION IN CANCER PREVENTION SCREENING

Background: The main areas of prophylaxis in oncology are the identification and elimination of factors that favor the formation of cancer cells, as well as early diagnosis of already formed lesions. The aim of this paper was to search for variable factors influencing women's decisions concerning prophylaxis. Methods: The questionnaires used included our own and standardized research. The research group consisted of 100 dyads. Results: All significant predictors were associated primarily with factors located on the female side. The only predictor on the side of men was their knowledge about women's cancer diseases. The frequency of taking preventive examinations for early diagnosis of cancer increased when the level of anxiety about one's own health was higher, and when the partner's support for preventive examinations was higher. Conclusions: The predicting factors identified in our study might be included in the development of cancer prevention action strategies by public health institutions.

**Keywords:** women's cancer prevention, dyads, support, health.

### 1. INTRODUCTION

The epidemiological situation regarding the incidence of cancer in women is not optimistic [National Cancer Registry..., [http;](http://) Markowska, Mądry, 2014; Youlden, Cramb, Dunn et al., 2012; Szkiela, Worach-Kardas, Marcinkowski, 2014]. The global aging of society additionally influences the increase in the number of new patients. The health policy of many countries includes cancer prevention and counteracting cancer in its main objectives [Gail, Pfeiffer, 2018]. In Poland, already since 2007, the Population Screening Program for Early Detection of Breast Cancer has been operating; it is aimed at women aged 50–69 years who do not have malignant breast cancer and have not undergone any treatment; it is reimbursed by the National Health Fund. The testing frequency and the

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selection of the age group of women in the national population screening are in accordance with the guidelines of the European Union.

The main areas of prevention in oncology are the recognition and elimination of factors that promote the formation of cancer cells, as well as an early diagnosis of already formed lesions [Tkaczuk-Włach, Sobstyl, Jakiel, 2012; Sun, Zhao, Yang, Xu, Lu, Zhu, Shi, Jiang, Yao, Zhu, 2017; Kolak, Kamińska, Sygit, Budny, Surdyka, Kukielka-Budny, Burdan, 2017; Borgquist, Hall, Lipkus, Garber, 2018; Gałuszka-Bednarczyk, Kiałka, Milewicz, Mrozińska, Dobosz, Janeczko, 2016; Kalliguddi, Sharma, Gore, 2019]. Although an increasing number of people is observed to be consciously taking preventive examinations, mammography and cytology, it is still not an optimal attendance [Najdyhor, Krajewska-Kułąk, Krajewska-Ferishah, 2013; Dahlui, Ramli, Bulgiba, 2011]. The low rate of women's participation in prophylactic examinations is confirmed in a study by Najdyhor et al [Najdyhor, Krajewska-Kułąk, Krajewska-Ferishah, 2013], where the vast majority of women have had neither mammography – 74% – nor breast ultrasound examination – 67% – in the 12 months preceding the examination. The results of Paździor et al. indicate that only 36% of the surveyed women performed regular breast self-examinations [Paździor, Stachowska, Zielińska, 2011], while Podolska confirms the respondents' insufficient participation in prophylactic tests for cervical cancer [Podolska, 2013].

Having knowledge about the prevention does not guarantee pro-health choices. Also, the fact of a better prognosis in the case of an early detection of lesions does not directly influence the women's choices. The conducted studies confirm that women were aware of the importance of prophylactic breast examinations, yet they performed them unsystematically [Dahlui, Ramli, Bulgiba, 2011; Paździor, Stachowska, Zielińska, 2011; Karczmarek-Borowska, Strykowska, Grądalska-Lampart, Grybel, 2013; , Ślusarska, Nowicki, Łachowska, Piasecka, Marciniak, 2016].

Therefore, after a thorough analysis of the available literature, the authors of this article took up the challenge to identify the variables that influence women's decision-making about prevention and, as a result, about life or its quality. Men were also invited to participate in the study. We assumed that their attitude, knowledge, and actions could have a significant impact on the women's choices.

## 2. MATERIALS AND METHODS

The study was designed to include the participation of women and their partners. The diagnostic survey method was used. The research technique was a questionnaire. The research tools were the author's questionnaire for socio-demographic assessment (which included a different set of questions for women and men) and standardized tools:

- Berlin Social Support Scale (BSSS) [Łuszczyńska, Kowalska, Mazurkiewicz, Schwarzer, 2006], to measure the cognitive and behavioral dimensions of social support,
- Health Anxiety Questionnaire (HAI-18) to estimate the severity of hypochondriacal attitudes,
- Illness Perception Questionnaire (IPQ-R), used to determine the respondents' beliefs about cancer,
- Health Opinion Questionnaire to assess the beliefs about health and its function in the life of the contemporary human beings,
- The statistical analysis methods were applied using the STATISTICA program.

The assumptions and implementation of the research project included the principles of good academic research practice, particularly the protection of the participants. Participation in the study was voluntary and anonymity was provided.

Each couple received a packet: a questionnaire for the woman and a questionnaire for the man, information on the study, instructions for completing the questionnaire, and an unmarked envelope. After completing the questionnaires, the respondents placed them in the envelope and sealed it, which guaranteed that each envelope contained data from one couple. Once the envelope was opened, both forms were coded with the same code for the female and the male version.

The requirements for including the couples in the study were: being in a formal or informal relationship for at least 1 year, no professional ties to the medical field, good health, and no contact in the immediate environment with people diagnosed or treated for cancer.

### 3. RESULTS

#### 3.1. Characteristics of the study group

The study included 200 individuals, i.e., 100 female-male dyads, living in Poland.

The characteristics of the subjects in terms of the sociodemographic data are shown in Table 1.

Table 1. Group characteristics regarding sociodemographic data

Sociodemographic data	Women ( <i>n</i> =100)	Female partners ( <i>n</i> =100)
<b>Age [years]</b>		
<i>M (SD)</i>	40.07 (12.01)	42.58 (12.09)
<i>min – max</i>	18-70	24-79
<b>Place of residence [%]</b>		
Country		56
City		44
<b>Education [%]</b>		
Elementary	2	4
Vocational	30	21
High school	5	28
Higher	63	47
<b>Employment status [%]</b>		
Working	75	85
Unemployed	17	5
Pensioner	8	10
<b>Nature of relationship [%]</b>		
Married		82
Informal relationship		18
<b>Relationship seniority [years]</b>		
<i>Mean (SD)</i>		16.04 (12.19)
<i>minimum – maximum</i>		1-51

Source: authors' own research.

Men were slightly older than their female partners ( $t=-7.65$ ;  $p<0.001$ ). Both women and men most often declared higher education and working professionally. The vast majority of relationships, 82% of respondents, were married couples with an average relationship duration of 16 years.

### 3.2. Findings based on the analysis of research tools

In our study, only 19% of women took preventive tests according to the recommendations, 21% of women estimated that they generally followed the rules, but without attachment to the time of performance. As many as 42% of women performed examinations infrequently, while 11% not at all.

Based on the obtained results, it may be stated that only 26% of the women have had a prophylactic examination for early detection of breast cancer within the last year, while one third have had a test for cervical cancer. It is noteworthy that 52% of the surveyed women admitted that they had other preventive examinations than those related to female cancer. However, 25% of women did not have any examinations within the last 12 months.

At the same time, the respondents were convinced that preventive tests were very effective. The most frequently chosen answer was the one with the highest effectiveness of the examinations. Only 4 participants claimed that these tests are not effective, and 18 people thought that the effectiveness of these tests was moderate. The respondents rated their own involvement in taking care of their health relatively highly: more than half (54%) believed that they were very involved in taking care of their health. Only 12 female participants declared that they did not care about their health (Table 2).

Table 2. Women's opinions on the effectiveness of preventive screenings in cancer prevention

Women's opinions	Descriptive characteristics					
	Mean	standard deviation	minimum	max	Median	Modal
Effectiveness of preventive testing	7.81	2.13	0	10	8	10
Commitment to taking care of your own health	6.67	2.03	1	10	7	8

Notes: n=100.

Source: authors' own research.

An important factor, following our research assumptions, was the participation of men in cancer prevention of their female partners. According to the women, their partners tended to try to take care of their overall health. Little or no involvement of men in caring for their partners' health was indicated by 24% of the women surveyed. 45% of men were assessed as moderately involved, while 31% were very involved in caring for their partners' health.

When it comes to motivating their women to get preventive screenings, only 11% of men were very actively involved. The majority of partners were either very rarely interested in these tests (39%), or occasionally mentioned the issue of performing them (39%). The remaining men were not at all interested in the preventive tests recommended for their female partners.



Partners' participation in women's preventive screenings consisted primarily of asking about the results of the screening (30%). 17% of partners were reminding about the necessity of the examination, and also 17% of men accompanied their partners during the examination. The lack of any form of participation of men was indicated by 36% of women.

As many as 61% of women declared that they would perform preventive examinations if their partner motivated them to do so. For 30% of female respondents it did not matter, while 9% declared that they would not perform these tests under the influence of their partners.

Being reminded and motivated by their partners were the behaviors most often indicated as favorable for taking preventive tests by women (23%). This was followed by a conversation and emphasizing the importance of examinations (15%) and accompanying the woman during these tests (8%). Other men's behaviors, related to modeling by their own example, caring for the family, or expressing love, were indicated as only occasionally motivating women to take preventive examinations. A comparison of men's and women's opinions on men's involvement in preventive screenings is presented in Figure 1.

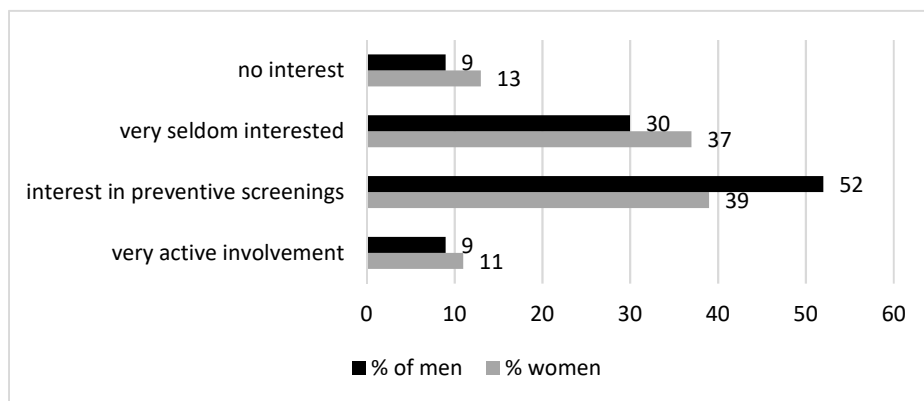


Figure 1. Men's involvement in women's preventive screenings as perceived by male and female respondents

Source: authors' own research.

The male respondents believed that regular preventive screenings are very important in the early diagnosis and treatment of cancer ( $M=8.38$ ;  $SD=1.92$ ;  $Me=9$ ;  $Mo=10$ ;  $min-max = 1 - 10$ ). The response most frequently indicated was the one that suggested a full belief that such screenings are significant.

According to the men, their female partners were committed to taking care of their health ( $M=6.87$ ;  $SD=2.38$ ). The responses of the male partners indicated that 45% of the women were very concerned about their health, while 27% were moderately concerned about their health. Only in 18% of the ladies the involvement was described as poor or a completely lacking action in this matter.

Almost one third of the men surveyed (30%) declared that they knew how to perform a breast self-examination. Simultaneously, 57% of them were convinced that their female partner could perform the examination correctly, while 37% did not know whether she knew

the rules of breast self-examination. Almost 38% of the men declared that the woman regularly performed breast self-examination, and 44% believed that their female partners regularly performed gynecological examinations.

An analysis of the cognitive image of cancer among men and women allowed us to search for correlations and their influence on women taking up preventive examinations. The respondents tended to perceive cancer as a chronic process, poorly understood, characterized by many negative consequences in the daily functioning of the sick person and their emotional state. The participants believed that there was a moderate possibility of influencing the course of the cancer disease by one's own activity. The effectiveness of medical treatment was also assessed as moderate. Men observed fewer health complaints in their female partners than the women did themselves. Meanwhile, they more frequently considered these complaints as symptoms that might be a manifestation of cancer. However, these differences did not reach the level of statistical significance. No significant differences were observed between women and men in the individual dimensions of the image of cancer (Table 3).

Table 3. Cognitive image of cancer in men and women

Image of cancer	Group	Descriptive statistics				Comparison of women vs men [p]
		Mean	SD	min	max	
Number of discomfort complaints experienced	K	6.00	1.38	0	13	0.195
	P	5.58	3.04	0	14	
Number of complaints experienced that might be a symptom of cancer	K	1.38	2.25	0	9	0.092
	P	1.89	2.94	0	13	
Duration and intensity (acute/chronic)	K	21.45	3.30	15	30	0.958
	P	21.43	3.17	15	30	
Consequences of the condition	K	25.16	3.20	14	30	0.064
	P	24.44	3.00	17	30	
Personal impact on the course of the disease	K	20.00	3.69	8	30	0.239
	P	19.45	3.61	8	27	
Effectiveness of treatment	K	17.20	2.82	10	25	0.953
	P	17.18	2.47	10	24	
Comprehensibility	K	13.86	4.34	5	25	0.983
	P	13.85	4.50	5	25	
Cyclicity/recurrence	K	13.80	1.93	10	18	0.144
	P	13.42	2.28	6	20	
Impact on emotions	K	24.50	3.82	13	30	0.38
	P	24.13	4.07	12	30	

Notes: nK=100; nM=100; K – female; P – partner.

Source: authors' own research.

The level of health anxiety due to cancer in the study group was moderate for both genders (K-33.03; M-31.22). Women showed a slightly higher hypochondriacal attitude than men, but this difference did not reach the level of statistical significance.

An important factor in taking care of one's health is knowledge about the topic. Figure 2 shows the men's assessment of their knowledge of "female cancer" issues.

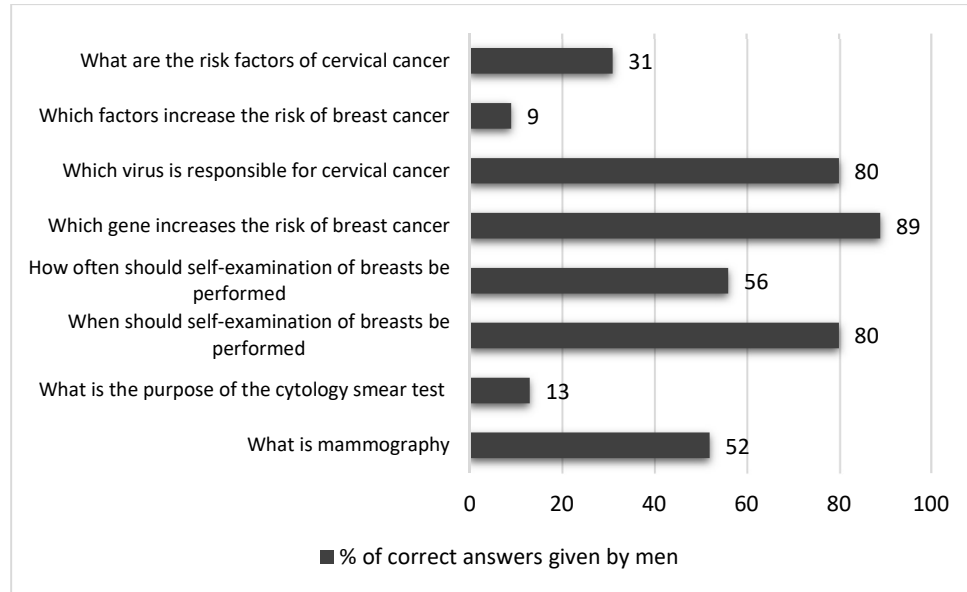


Figure 2. Men's knowledge of breast and cervical cancer

Source: authors' own research.

The men drew their knowledge primarily from Internet sources and from friends. A relatively small percentage of men (7–16%) used professional sources of information (doctors, nurses, medical publications).

To verify the correlations between the men's knowledge of breast and cervical cancer prevention and health-seeking behaviors in women, Kendall's tau-b coefficient analysis was conducted.

It was shown that greater knowledge of men about breast and cervical cancer is associated with better care for women's health ( $\tau=0.25$ ;  $p<0.001$ ), a greater frequency of preventive examinations taken by their female partners ( $\tau=0.27$ ;  $p<0.001$ ) and a greater feeling of women that their partner cares about their health ( $\tau=0.24$ ;  $p<0.01$ ). On the other hand, we also found that the greater the men's knowledge about women's cancers, the less often their female partners felt motivated by the men to have preventive tests ( $\tau=-0.25$ ;  $p<0.01$ ).

The object of the study was also to analyze the relationship between men's knowledge of breast and cervical cancer prevention and social support. To investigate this, Kendall's tau-b coefficient analysis was conducted (Table 4).

Table 4. Men's knowledge of women's cancer vs. social support

<b>Social support</b>	<b>Men's knowledge of women's cancers</b>
Support received (k)	0.15*
Emotional support	0.16*
Instrumental support	0.09
Informational support	0.12
Buffering support (k)	-0.02
Satisfaction from support received (k)	0.21*
Support provided (m)	0.24**
Emotional support	0.27**
Instrumental support	0.18*
Informational support	0.22*
Buffering support (m)	0.09
Deficit of support	-0.07

Notes: n=100; \* p<0.05; \*\* p<0.01; \*\*\* p<0.001; (k) – female rating; (m) – male rating.

Source: authors' own research.

Men's greater knowledge of women's cancer was significantly associated with their greater declared support, primarily emotional, as well as with the women's greater satisfaction with the support they received. The remaining correlations proved to be either insignificant or their strength was very poor.

An investigation of the correlation between taking care of one's health and undertaking preventive screenings and social support is presented in Table 5. Women were more likely

Table 5. Social support and health-seeking behaviors in women.

<b>Social support</b>	<b>Women's health-seeking behavior</b>	
	<b>Taking care of one's health</b>	<b>Frequency of preventive examinations</b>
Support received (k)	0,24**	0,21**
Emotional support	0,23**	0,21**
Instrumental support	0,24**	0,25**
Informational support	0,24**	0,21**
Buffering support (k)	0,03	0,06
Satisfaction from support received (k)	0,23**	0,30***
Support provided (m)	0,29***	0,30***
Emotional support	0,32***	0,34***
Instrumental support	0,22**	0,25**
Informational support	0,23**	0,23**
Buffering support (m)	0,02	0,04
Deficit of support	-0,02	-0,02

Notes: n=100; \* p<0.05; \*\* p<0.01; \*\*\* p<0; male rating.

Source: authors' own research.

to take preventive screenings and were more likely to take care of their health when they received more emotional, instrumental, and informational support. Buffering support did not prove to be statistically significant.

A similar pattern of relationships was observed for the correlation between the support declared by the men and the women's health-seeking behaviors. Women cared more about their health and undertook more preventive examinations when their partners provided more emotional, instrumental and informational support. It is noteworthy that in according to the men, the correlation between the women's pro-health behaviors and the support provided by the men is stronger than the correlation between the pro-health behaviors and the men's support received as reported by the women. The correlations between the support deficit and pro-health behaviors of women turned out to be statistically insignificant.

The authors attempted to determine the predictors of women's caring for health and participation in preventive examinations for breast cancer and cervical cancer by conducting a stepwise linear regression analysis. First, variables characterizing women were introduced into the model: health image, cancer image, health anxiety, received support, emotional state, and belief in the effectiveness of preventive examinations. In the next steps, analogous variables characterizing the women's partners were introduced. The analysis was conducted twice – once to identify the predictors of caring for one's health, and a second time to identify the predictors of the frequency of preventive screenings. The results of the regression analysis for caring about one's health are presented in Table 6.

Table 6. Predictors of women's taking care of their health

Predictors	Taking care of one's health			
	<i>R</i> <sup>2</sup>	$\Delta R^2$	$\beta$	<i>F</i>
Personal check (k)	0.35	0.09	0.23	11.58 ( <i>p</i> <0.001)
Partner support with preventive screenings (k)		0.15	0.19	
Instrumental support received (k)		0.03	0.10	
Emotional support provided (m)		0.04	0.27	
Knowledge on female cancers (m)		0.04	0.16	

Notes: n=100; (k) – female assessment; (m) – male assessment.

R – Multiple correlation coefficient, F; p – Significance of the equation  
R<sup>2</sup> – Coefficient of multiple determination, t – *t-Student's* test

Source: authors' own research.

The results of the regression analysis for the frequency of preventive screenings are presented in Table 7.

Table 7. Predictors of women's participation in preventive screenings for early diagnosis of breast and cervical cancer

Predictors	Frequency of preventive examinations			
	<i>R</i> <sup>2</sup>	$\Delta R^2$	$\beta$	<i>F</i>
Health anxiety (k)	0.41	0.07	0.34	12.21 ( <i>p</i> <0.001)
Personal check (k)		0.03	0.03	
Instrumental support received (k)		0.09	0.15	
Partner support with preventive screenings (k)		0.04	0.19	
Need for help in coping with emotions (k)		0.14	-0.41	
Knowledge of female cancers (m)		0.04	0.20	

Notes: n=100; (k) – female assessment.

*R* – Multiple correlation coefficient, *F*; *p* – Significance of the equation  
*R*<sup>2</sup> – Coefficient of multiple determination, *t* – *t-Student's* test

Source: authors' own research.

#### 4. DISCUSSION

The widely discussed branch of oncology, cancer prevention, is still not treated as a priority by many people, including health professionals. In our study, only 26% of women had a prophylactic breast examination (self-examination, ultrasound, mammography) within the past year, and 33% had a cytology test.

More than half of the women surveyed (52%) declared having another preventive examination performed. The list included mainly blood tests and imaging diagnostics, i.e. ultrasound, radiological examinations (radiographs, tomography) and RMI of different body regions. However, these are not cancer prevention tests. Perhaps the respondents wished to be perceived better by indicating that they did perform certain medical activity to take care of their health, especially that all of these procedures required going to the doctor to get a referral. Yet unfortunately, this may actually confirm their low motivation and poor determination in taking care of their health.

In our project, women were convinced about the effectiveness of preventive examinations, which, however, did not prompt them to seek preventive examinations. Our study revealed that the majority, 61% of the women, said that they would perform preventive examinations if their partner motivated them to do so. However, nearly 80% said that men rarely or occasionally took interest in their medical examinations. In contrast, more than half of the men declared having mentioned preventive examinations to their female partners. As many as 72% of men felt that their female partners were very or moderately concerned about their health. In the context of the frequency of women actually getting examinations, these values do not match at all. Perhaps the ideas about participation are identified as activity. This might be true considering the fact that especially men were significantly convinced about effectiveness of preventive screenings for early diagnosis and

treatment of cancer, which may have been taken as an obvious indication of taking action for the benefit of one's health.

In addition, the study showed that men's knowledge about women's cancers correlated with the women better caring about their health. Although the correlation value was not high, it indicated this direction of dependency. A correlation between the women feeling less motivated by their male partners was also observed for men who had more knowledge. This may be related to the logical and pragmatic reasoning of men and the belief of almost three quarters of the respondents that their female partners are taking care of their health. Meanwhile, Najdyhor's study [Najdyhor, Krajewska-Kulak, Krajewska-Ferishah, 2013] confirmed men's insufficient knowledge about preventive breast cancer screening. And Pietraszek et al., investigating the awareness of men of different nationalities about women's breast self-examination in women, found that most of the respondents had no knowledge on whether the women around them perform breast self-examination [Pietraszek, Charzyńska-Gula, Łuczyk, Stanisławek, Koziół, Kocka, Kocki, 2015].

Greater knowledge of the male partners was also significantly associated with greater emotional support provided by them and a greater satisfaction of the women with the support received. The type of support indicated is interesting, in that theoretically approaching the issue, one would expect instrumental support. Perhaps when acting stereotypically, the men do not choose the right ways to motivate their female partners to get preventive examinations.

Of note, the strength of the correlation between health-seeking behaviors and the support given reported by men is greater than the strength of the correlation between health-seeking behaviors and support received reported by women. Either inappropriate cognitive assessment of the women might be the case, and they do not notice the support provided by the men, or their male partners are assessing the support they provide as better than is actually is. The lack of communication on this topic, or treating this matter in a purely intuitive way, might create such a picture.

An analysis of the cognitive image of cancer was also not without significance. Both women and men described cancer as a process that is poorly understood, has many negative consequences, and there is only a moderate possibility of influencing its course by taking one's own actions. Certainly, this opinion may have a demotivating effect on the desire to "do one's best".

The level of anxiety about health due to cancer in the study group was moderate in both genders. Perhaps the selection of the study group, where the criterion of inclusion was, among others, a lack of experience of cancer in one's immediate environment and the exercise of a non-medical profession, caused such an effect. In the studies of other authors, the fear of cancer possibly correlated with a more frequent participation in prophylactic examinations [Choi, Lee, Suh, Park, Jun, Kim, Choi, 2018; Vrinten, Waller, von Wagner, Wardle, 2015], and it may be decreased by reliable information [Pahlevan Sharif, Ahadzadeh, Ong, Naghavi, 2020].

The research project described above allowed us to fulfill the objective of the study. The authors of the article identified the predictors of women taking care of their health, as well as the predictors of taking preventive examinations by them.

As for the frequency of women having preventive screening, the model explained 41% of the variance in this variable. All significant predictors were associated primarily with factors on the woman's side. The only predictor on the male side was their knowledge on female cancers. The frequency of preventive examination for early diagnosis of cancer

increased when the level of health anxiety was higher, when the partner's support for screening tests was higher, when the instrumental support received increased, when there was a lower need for help in coping with negative emotions connected with the thought of having a preventive test, and when the men's knowledge about women's cancer and its prevention was higher. The women's belief that they are able to influence the course of the disease through their own behavior lost its statistical significance when instrumental support received was introduced into the model. The scope of support and its strength should be adequate to the needs. It is not possible to clearly define the theoretical pattern of the level of support given, as too much support may reduce the self-esteem of those supported and will not have a positive impact on the achievement of the intended goals. On the other hand, too little support will not be enough to convince people to take preventive measures.

In our unique study, the variables introduced into the model explain 35% of the variance in women caring about their health. Among the significant predictors there are factors that characterize women themselves, as well as factors that lie on the side of the men. It turns out that women's health-seeking behaviors increase when her belief that the course of cancer depends on her behavior is greater, when a woman perceives strong support from her partner regarding preventive examinations, when she receives more instrumental support from her partner, when the woman's partner has more knowledge about women's cancer, and when the man considers himself as giving the woman more emotional support.

Despite the issue of cancer prevention being present in many areas of our daily life, as well as in the medical sphere, our study proved that this topic should be deepened, and predictive factors for women's participation in preventive examinations should be investigated.

## 5. CONCLUSIONS

A study of male and female life partners found that their mutual relations should include health-related activities. Cancer prevention may be stimulated by engaging in appropriate behaviors, especially through motivating and supportive behaviors.

In cancer prevention, the predictors that proved to influence the women's decision making about preventive screenings are: greater partner support for preventive screenings, higher levels of health anxiety, increased instrumental support received, less need for help to cope with negative emotions related to the thought of preventive examinations, and greater male knowledge about women's cancers and their prevention.

Our study clearly shows that influencing by only disseminating knowledge is insufficient, although important. The predictive factors identified in our study could be taken into account in the development of cancer prevention action strategies by public health institutions.

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## THE NEOLIBERAL APPROACH TO CORPORATE SOCIAL RESPONSIBILITY AND ECONOMIC PATRIOTISM

The problem of economic security should be considered as an organized development of the economy and the need to ensure an appropriate level of enterprise efficiency and quality of life from advanced technology, intelligent technology, incoming stream, and the proper flow of information. Neoliberals can make it so that states should implement the no-disturbance principle; this will have the entrepreneurial realization effect. One needs to find out if there is still room for charity and trustees in the global world. Is it only meeting the main comments about the development of individual entrepreneurship, which comes from energy resources?

**Keywords:** social and economic security, responsibility, business, economy, patriotism.

Many events in the world, the fall of communism, the fight against the accusations of journalists, the financial crisis or the announcement of the twilight of capitalism, various discussions and considerations, including based on the intersection of ethics and capitalism. R. Legutko writes about ethics in the mind with capitalism, drawing attention to the issue (Legutko, 1994): „The standard version of the anti-capitalist and Weber's concept has been introduced, capitalism is a system that recognizes man as a being who finds identity and meaning of existence in relation to other people [...]”.

Adam Smith pointed out that he had never seen much good done by people who pretended to trade for the common good. Since people are more likely to resonate with our joy than with our sorrow, we usually display our wealth and conceal our poverty. mainly because of other people's feelings, we strive to gain riches and avoid poverty (Smith, 1999).

Andry Carnegie, an industrialist, steel magnate, philanthropist, and investor in numerous cultural ventures, wrote *The Gospel of Wealth*. He referred to the biblical foundations, showing the principle of mercy, which requires people who have achieved success – to support those who, for various reasons, may feel less happy, to support the unemployed, the disabled, the sick or seniors (Smith 1989).

In neoliberal ethics, the assumptions of libertarian ethics are adopted: the economy and the market are free from ethical evaluation; economics and ethics are integrated by the right to self-ownership and private property; what should be guided in ethics is the nature of man common to all people and the rights resulting from it (Zwoliński, 2002).

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Economics and the free market are associated with ethics, although their autonomy and independence are assumed. Economic processes are assigned an ethical value, and the free market teaches ethical principles and is ethical in itself. K. Przybyszewski proposes to take into account the following axioms of neoliberal theory (Przybyszewski, 2005):

1. The market activates individuals, enhances their resourcefulness and ingenuity, which contribute to multiplying the assets of individuals and, at the same time, to the growth of the national wealth.
2. The market is a natural mechanism for the promotion and development of the most talented and socially effective individuals.

### 1. POLEMICS AROUND CORPORATE SOCIAL RESPONSIBILITY

It is also worth referring at this point to the views of Milton Friedman, the guru of neoliberalism, whose opinion is very often quoted, namely: “the sole social responsibility of an enterprise is to use resources and energy to increase profits, provided that it plays by the rules, i.e. participates in free competition, without resorting to trickery or deception” (Friedman, 1970). The sole purpose of the entrepreneur is to maximize profits for the sake of obligations to their shareholders (Friedman, 1962). Friedman writes about corporate social responsibility as follows: “what does it mean to say that the director of a corporation has “social responsibility” as a businessman? If it is not a purely rhetorical statement, it must mean that he is expected to act in some way that is not consistent with the interests of his employers” (Friedman, 1999).

Let us also mention the view that philanthropy is irrational as a corporation pays taxes to the state, and the state deals with the redistribution of funds, e.g. for social purposes, and “Giving away” is unjustified because companies do not have the knowledge or competence to properly assess common needs. In addition, social involvement gives an opportunity to dominate the environment, and by strengthening the position of managers, it leads to inevitable and constant conflicts. It is also worth noting that in this line of reasoning, CSR, if it already exists, refers to doing good at one's own expense; with the principles of free enterprise and voluntary, not prescriptive responsibility. The most frequently cited arguments against social responsibility are (Griffin, 2004; Rudnicka, 2012):

- an enterprise is like a machine whose task is to achieve previously set goals. People in the organization should not be guided by personal moral values, but pursue goals that serve the organization,
- social responsibility is a tool only to improve the image,
- enterprises were not established to solve social problems,
- CSR is perceived as an additional cost and burden for enterprises,
- interference in a sphere not directly related to the functioning of enterprises may give rise to additional ethical dilemmas or the possibility of a conflict of interest.

Besides, among the arguments: against, CSR can be seen as a procedure, a PR – marketing ploy and so-called “pulling the wool over the eyes” of consumers and contractors. These activities can be treated as facade, cynical and instrumental, especially when very fashionable terms related to human rights in the broadest sense appear. Economist Witold Kwaśnicki, during a debate in November 2011 in Kraków on CSR, asked representatives of companies building an image of socially responsible business and participating in “Mleczny start/Partnerstwo dla zdrowia” (“Milk Start/Partnership for

Health”) program whether they earn a lot on this activity, the answer was clear: “yes, quite a lot, otherwise we would not support this program”.

Neoliberal Janusz Korwin-Mikke is against mixing business with charity and lists further arguments against CSR (nczas.com, 2013):

- “Corporate social responsibility” does not exist. There is only the social responsibility of individual people. And not as businessmen as a person running a business should only care about making as much money as possible. When he earns it, then – as an individual – he can spend his money on various useful purposes. And this includes his social responsibility. By contrast, when he works as a businessman, his responsibility is to maximize profits, to be a predatory entrepreneur.
- Corporate social responsibility, which is occurring as a kind of social movement, is [...] a disturbing phenomenon. [...] There are plenty of examples of what useful things very rich people have done. And such people spend money more sensibly. A person who makes a lot of money knows other people, so that he doesn't give money to spendthrifts, but to those who really need it”.

From the opposite point of view, namely trade and marketing, CSR is important because there are consumers who choose to purchase a service or a product of an enterprise having positive information about that enterprise. There are also consumers in the market who criticize the enterprise in conversation with others because of its activities, and are even willing not to buy a service or a product because of a bad opinion of the enterprise. For instance, Starbucks, which is known for violating labor rights, unfair competition and contributing to environmental devastation, conducts a number of promotional campaigns, engaging in rainforest protection (krytykapolityczna.pl, 2015). As Slavoj Žižek very aptly notes, the consumer will gladly pay the few tens of cents extra for each cup of coffee so that Starbucks can contribute to the fight for the good of the environment without jeopardizing its profits (krytykapolityczna.pl, 2015).

Among the voices supporting corporate social responsibility, it is worth noting Elizabeth Warren's speech in the US Congress, who pointed out that there was no one in that country who had come to wealth alone. You built a factory - that's great. But let's face it, you hauled goods over roads that the rest of us paid for. You employed workers who were educated with our money. You were safe in your factory, because you were watched over by police and firefighters with our money. You had a great idea, something wonderful came out – God be with you. Take a piece of the pie for yourself. But part of the social contract is that you will give the rest to the next child who wants to follow in your footsteps.

Corporate social responsibility expects personal contributions to the rule of law of its employees. A highly ethical attitude also sets the corporation's expectations of its suppliers. It is expected that in the course of its business, it should comply with applicable laws and ethical conduct, in particular; do not employ minors, do not discriminate against your employees for any reason, especially on the basis of gender, age, race, nationality, political beliefs or religion, comply with legal requirements for minimum wages and working hours, comply with environmental regulations, provide employees with safe and healthy working conditions, comply with competition and consumer protection regulations, comply with restrictions established in international trade and diligently maintain business records, comply with the requirements related to cooperation with state administration, both government and local government, do not do business with criminal suspects, including those suspected of money laundering or terrorist financing, respect the intellectual property

rights of third parties, comply with accounting regulations and standards and reliably maintain financial records, develop and implement a policy of compliance with professional ethics. In "A Future Perfect" we read about the success of Silicon Valley, one of whose successes is its propensity to share wealth, at least within the company. When Kingston Technology was sold to Softbank for \$1.5 billion in 1996, its founders set aside \$100 million to be divided among the company's employees (Micklethwait, Wooldridge, 2003). Like many software companies, Kingston offers employees full health care, free lunches and generous pensions (Micklethwait, Wooldridge, 2003).

## 2. PRIVATE ENTREPRENEURS AND ECONOMIC PATRIOTISM

The situation of entrepreneurs in times of transformation is still associated with the previous political and economic system. The reign of the imposed system in Poland after 1944 led to the almost complete destruction of the business class. The private sector was liquidated by economic and administrative methods. The elimination of entrepreneurs was carried out by the communist authorities mainly using the fiscal system. Entrepreneurs more and more often ceased their activity due to the unprofitability of production. Many ended up in prisons and forced labor camps for "sabotage", "embezzlement", and "speculation". The penalties for forfeiture of property and fines were very severe, and a state official could punish for the so-called "External Signs of Wealth". In order to survive in competition with state-owned factories, a few small entrepreneurs often joined the party. The children of entrepreneurs were not admitted to studies, and the sons of craftsmen were forcibly conscripted into the army. In 1946, a law was introduced on the nationalization of companies that employed over fifty employees. In Art. 1 of the Act emphasized that the takeover of enterprises by the state takes place "for the planned reconstruction of the national economy, ensuring the state's economic sovereignty and increasing the general welfare" (Act of January 3, 1946 on the takeover of basic branches of the national economy into state ownership).

In total, the authorities took over 6,000 private companies. Laws were also introduced "on fighting high prices and excessive profits in trade", "on civic committees and social inspectors" and the Price Bureau was established, which set margins and fees. In 1947, there were 134,000 shops in Poland, and two years later there were 78,000. As a result of such actions, private entrepreneurs were exterminated, and all economic life was in the hands of the state, managed by an army of party bureaucrats (Ostaszewski, 2003).

In the People's Republic of Poland, the hatred of so-called "privatizers", "speculators", "upstarts" and "greengrocers" was also part of official socialist propaganda, hostile to the market and entrepreneurs. Neoliberal Jan Fijor notes that the situation is still the case because in the arduous work of perpetuating the anti-entrepreneur stereotype, politicians are bravely assisted by the media, which, instead of educating people about entrepreneurship and showing its benefits, are more willing to engage in a campaign of reprimand against rich, active, enterprising people. In the press or on the radio, one is more likely to encounter advice on "how to get social assistance" or other benefits than "how to start your own business or increase production". J. Fijor in the article "Bogaty, czyli Zły" (fijor.com, 2004). "In Poland, poverty, mediocrity, blandness are still valued more than wealth and entrepreneurship. Living on someone else's account is not condemned in our country, the approval of poverty and contempt for entrepreneurship has become a stereotype". He accuses those in power; of lacking the goodwill to change and stand up

for hard-working citizens rather than the bureaucracy, and furthermore, entrepreneurs are to continue to be treated as outlaws.

Kazimierz Ostaszewski of the Catholic University of Lublin, based on calculations from; the Ministry of Family, Labor and Social Policy, the World Bank, the Supreme Administrative Court and the Ministry of Finance, described the anguish of entrepreneurs in numbers (kul.pl, 2016):

- 980 days one waits for civil court case to be resolved,
- US\$925 – this is the cost to start a business,
- 90% – this is the average burden of tax and social security on net wages social security,
- 55 – the number of laws prescribing taxes, fees and duties (plus a difficult to determine number of implementing acts),
- 54 days – this is how long, on average, it takes to register with the National Court Register,
- 50 years a company must keep the personnel files of its employees,
- 46 weeks is the duration of administrative proceedings related to obtaining permits and decisions on a planned investment,
- 40 – this is how many different institutions control the entrepreneur (competencies often overlap),
- 31 days – the time it takes to completely register a company,
- 31 days – the average period of recovery of overdue payments,
- 15 days – that's how long it takes on average to deal with one case at the office,
- 12 pages of documents for the Social Insurance Institution must be filled out each month by a business person,
- 11 offices must be visited by a person who wants to open a business,
- 1 hour and 20 minutes are spent by entrepreneurs per day on various official clerical formalities.

The integrity of entrepreneurs has been studied since the early 1990s. An interesting study on self-employed people was conducted by G. Matuszczak. It resulted from them (Matuszczak, 1994):

- one in four believed in honesty and legality in conducting private business,
- 34 percent of those surveyed thought it was possible to do business legally and honestly, 19 percent that it was not possible, and 31 percent that it depended on circumstances.

Prof. Juliusz Gardawski, head of the Department of Economic Sociology at the Warsaw School of Economics, recalls that “In the early 1990s, there was a clear aversion to them. The average worker believed that the emergence of the “middle class” would push him into the “lower class”. Entrepreneurs were said to be [...] thieves, because how else could they get rich quickly? This has changed, the traditional class divisions between wage earners and owners are less often cited as an axis of conflict. Many workers, while expressing outrage at the rich, do not feel resentment toward the private employer. Demonstrating symbols of material position is irritating. Keep in mind that egalitarianism is still dear to most working people. Residents of blocks of flats see plowed estates, some workers irregularly receive salaries, and families of business owners drive luxury cars. In contrast, the private entrepreneur in my workplace is “ours”, peculiar, especially if one does not “elevate” oneself with wealth” (Gardawski, 2006).

Irena Reszke, on the other hand, examined the stereotypes of private entrepreneurs in Poland. The study was to resolve whether and what kind of correlations exist between the degree of approval of systemic transformations in Poland and the assessment of the impact of these transformations on the personal situation of the respondent and the type of stereotype of the private entrepreneur. If respondents treat the development of the private sector in the economy as an important element of the systemic transformation, and private entrepreneurs as representatives of this sector, then such correlations should occur. It turned out that those accepting the transformation and assessing its outflow on their personal situation as favorable more often than others themselves expressed a positive stereotype of the owner of a private business, while those reluctant to the transformation and assessing the changes in their lives caused by it as unfavorable more often revealed a negative stereotype.

She further determined (Reszke, 1994):

1. Among those who hold a negative view (stereotype) there are relatively more men, and fewer women than among those who hold a positive view.
2. Among those with a negative attitude toward "privatizers" there are relatively more people with the least education (only elementary school) than among those with a positive attitude.
3. Those with negative attitudes are, on average, slightly older than those with positive attitudes (The Center for Public Opinion Research conducted a survey, which showed that the prevailing belief among Poles is that there are currently rather good conditions for the development of entrepreneurship in Poland).

It is noteworthy that among those who are self-employed, positive assessments of the conditions for the development of entrepreneurship are more frequent than on average among the general public (Komunikat badań CBOS, 2010). Running your own business is the most attractive career path for at least half of young and middle-aged people. For those over fifty, working in a state-owned enterprise is generally more attractive. Nearly one in two respondents believe they have the right aptitude to be self-employed, but more than half as many are thinking about starting their own business in the future.

The latest 2015/2016 survey of Polish entrepreneurs shows the following results: (Prepared in-house on the basis of TNS Poland research for Reliable Company and the publication "Wizerunek Przedsiębiorcy" by the Civic Development Forum (FOR), as part of the Polish Business Roundtable's Polish Entrepreneurship Promotion program):

- "Entrepreneurs are respected by the Poles, they are attributed the following qualities: high education, hardworking and caring for the environment.
- Young, affluent and well-educated people most often attribute positive qualities to entrepreneurs.
- Contradictions are also noticeable, with entrepreneurs being necessary on the one hand, and not necessarily honest on the other.
- In the question about "Your employer", the results obtained were much better than in the questions about "Employers in general". The resulting situation is due to the negative opinions about entrepreneurs in mass - media coverage and the prevailing stereotype in part of society.
- 73 percent of respondents agreed with the statement that entrepreneurs build the strength and quality of the domestic economy.



- Nearly 3/4 admitted that it is thanks to the taxes they pay that the government has funds for health care, education, police, military, road investments, etc. It must have taken more than a quarter of a century for the public to begin to understand that it is not the government that gives jobs and finances the operation of many spheres of public life, but private entrepreneurs.
- There is still a strong belief that a successful business man can be dishonest. More than half of those surveyed, as many as 62 percent, believe that they are trying to cheat the system in order to pay lower taxes.
- Respondents also negatively assessed the competitiveness of Polish companies. 58 percent believe that entrepreneurs are building a strong economy, but are less competitive than foreign companies.
- There is also a perception that it is difficult to make a living and make a career in a private company. And 4/5 believe that salaries in this sector are too low.
- The global financial crisis has not caused a significant deterioration in the image of entrepreneurs in Poland. Such deterioration took place, among others, in a number of countries of the “old” EU (countries of the South, the Netherlands, Belgium, France, Sweden). [...] Poland's different institutional history, especially the memory of the time of the Polish People's Republic, to some extent protects [...] against the spread of some of the existing populist anti-market attitudes in the West”.

Surrounding the discussion of entrepreneurs, there has been a discussion of the need for economic patriotism – that is, decisions of an economic nature (that is, for example, selling, buying), made consciously and taking into account its positive impact on the socio-economic environment (i.e., if only the country or the local community). However, one should not forget about the environment of the modern world, namely globalization and the accompanying changes and trends, which become apparent in the sphere of consumption mainly through (Włodarczyk-Śpiewak, 2009):

- 1) the initiation of new forms of consumption and consumption behavior,
- 2) creation of new products, new outlets and new needs,
- 3) changing modes of consumption, trends and lifestyles,
- 4) increasing consumer activity in the market,
- 5) increasing competitiveness and entrepreneurship of consumers.

In response to new challenges in 2013 the Ministry of Economy made efforts to debate the topic of economic patriotism. Since information about the origin of a product from Poland is specifically highlighted, only in one in four manufacturers (information about the country of origin or symbols associated with Poland). Polish consumers declare ethnocentric attitudes towards domestic products and one can see elements of consumer patriotism in the declarations. However, the results of the declarations obtained in the surveys do not show the true purchasing actions of market consumers.

The position on this issue was taken by the Union of Entrepreneurs and Employers focusing on foreign competition, suggesting that they are supporters of the free market, free trade and enemies of state protectionism. On one condition - that foreign corporations also pay taxes and do not transfer all profits outside Poland.

We can also use the example of Asseco S.A., which appears as a leading CSR leader on social and business grounds.

One of the main ideas of the company's founder and president of Asseco Poland Adam Góral is the slogan of "economic patriotism". Explaining and characterizing this concept, let's list the following:

- capital has nationality, and privatization should not take place without Polish capital,
- Polish companies should support each other, and businessmen should pay taxes in Poland, in this way we can support our economy. It is the tax revenues that support the development of the country and local communities,
- the choice of a Pole, if there is such a possibility. If, for example, I have several contractors to choose from and a Pole guarantees me a good price and quality, I prefer them, and I am not ashamed of it,
- a patriot can also be in a corporation. Such a person should constantly think in their work how to draw their corporation into investing money in Poland,
- the goal must be sustainable development. If the economy is handled by decent people, then we have a guarantee that they will make sure that everyone gets rich along with them.

Economic experts from the Adam Smith Center in Poland, on the other hand, argue that it is better for an entrepreneur to operate in the UK than in Poland (wolnosc24.pl, 2017): "If the government does not make better conditions for small businesses in particular, then talk of economic patriotism will be just annoying empty words. The Poles locally and those who have emigrated must have competitive conditions. with business costs of 1/3 of revenue, a Polish entrepreneur must give back to the state as much as 83% of the money earned, more than five times as much as a British one. This results in many people not starting a business at all. The middle class, which is the engine of economic development, therefore has no chance to develop as it does in Britain".

In a neoliberal tone, Jan Fijor in the conservative-liberal "Najwyższy Czas" disapproves of economic patriotism (Fijor, 2004):

- "In economics, the only criterion for economic efficiency is the ability to manage resources better than others. Nationality is not a guarantee of such skill, just as skin color, nose shape or height is not.
- Using an unnatural and inadequate criterion forces one to use violence, that is, to give up the basic condition for economic efficiency, which is freedom of choice.
- Patriotism as an economic criterion leads to statism, socialism, and these, as we know, lead to poverty.
- The national interest in the economy does not exist. The nation does not have one common interest even in political issues.
- "Nation" is a convenient political construct used by interest groups to run the nation i.e. millions of citizens. The main benefit of the "national interest" goes to pressure groups, interest groups or the group holding power. The national interest, is their interest.
- Patriotism is very often a denial of individualism. A doctrine very convenient for those who, in the name of enigmatic national interests (read: self-interest), want to grab the nation by the face and use it for themselves.
- The United States, one of the wealthiest countries in the world, was built on non-national interests. And that's why that's where all those who export their wealth for fear of the defenders of national interests are investing, to keep it safe".

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## **AN ASSESSMENT OF THE FINANCIAL SITUATION OF NATURALLY VALUABLE RURAL COMMUNES IN POLAND**

The aim of this article was to identify and assess the financial situation of naturally valuable rural communes in Poland, set against the background of other rural communes and the entire country. The empirical material of the article concerns the whole of Poland, as well as all its rural communes. The figures concerning the years 2019–2021 were retrieved from the Local Data Bank of the Central Statistical Office in Warsaw. The collected and structured empirical material was developed in a descriptive, tabular, and graphic form, using a comparative analysis. Furthermore, all diagnostic characteristics were presented as a score, illustrating the financial situation of naturally valuable rural municipalities in Poland compared to other rural municipalities as well as the entire country for 2019–2021. This was an innovative approach to the discussed research problem. The analysis of statistical data confirmed the research hypothesis that the local governments of naturally valuable rural communes in Poland use the resources of the natural environment and successfully cope with existing difficulties related to the need to protect nature. Thus, they achieve similar economic and financial results to other rural communes in the country.

**Keywords:** rural communes in Poland, financial situation, areas of natural value.

### **1. INTRODUCTION**

The interest of economic sciences in natural resources and their use is based on the fact that the use of the natural environment is closely related to the value of manufactured goods. The first views on this subject appeared in mercantilist and physiocratic economic thought, along with leading representatives of the so-called objective theory of value, such as W. Petty and R. Can-Tillon. It was then argued that the value of the produced material goods was determined by human labour and land, whereas the physiocrats attributed the land a function of the only factor for creating value and looked for sources of value created in the economy in the sphere of agriculture. It should be added that this was the first indication

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of the problem of valuation of elements of the natural environment (Czaja, 1993; Landreth, Colander, 1998).

The foundations of the classical theory of the use of natural environment resources were developed by A. Smith, D. Ricardo, T. Malthus and J. Mill. According to Smith, the level of economic development of individual nations results from the abundance of natural resources and depends on the general development of civilization combined with capital. The resources of the natural environment may, however, constitute a barrier to growth and as a consequence the process of capital accumulation is the condition for further economic progress. Ricardo believes that endowment with natural resources does not prejudice the level of national wealth. On the other hand, the barrier to economic development results from the law of decreasing land productivity, the effects of which are not compensated by growing revenues in the processing industry, which in turn has a negative impact on the rate of accumulation and differentiates the level of social product per capita. Malthus, on the other hand, treats resource scarcity and its economic effects as an axiom. There is an absolute limit to the availability of resources. According to his concept, the number of people grows exponentially, while the amount of goods that ensure their existence grows at an arithmetic rate. Hence, any increase in population requires an increase in the intensity of cultivation, and this entails a decreasing income. Mill argues that the primary goal of human activity should be to continue social progress, not to seek growth at all costs. In addition, attention is drawn to the importance of the natural environment for the quality of life, emphasizing recreational, aesthetic and psychological values (Smith, 1954; Ricardo, 1957; Mill, 1965; Bremond, Salort, 1997).

The neoclassical direction of economic theory also pays a lot of attention to the problems of natural resources and the environment of human life, and two groups of views should be distinguished in this respect, i.e., conventional (conservative) and alternative (revisionist) (Woś, 1995; Goodland, Ledec, 1987).

It should be added that traditional growth theories were dominated by treating natural resources as free goods with zero price, which resulted in a discrepancy between producer costs and social costs. On the other hand, contemporary theories promote the transformation of free goods into economic goods, as well as the creation of specific profits resulting from natural resources and the transformation of these resources into capital. As a consequence, these goods are indexed (Parteka, 1997).

An attempt to clarify the subject of environmental economics was undertaken in Poland in the late 1980s, with three basic areas of research distinguished, i.e., the economic theory of the use of natural resources, the economic theory of environmental conservation and the economic theory of pollution and environmental protection. In the first area, the study of the optimal allocation of renewable and non-renewable natural resources was adopted in accordance with the utilitarian or Rawls criterion<sup>3</sup>. The second area deals with the study of optimal conditions for the use of environmental resources from the point of view of recreation and aesthetic values as an alternative method of their exploitation<sup>4</sup>. The third

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<sup>3</sup> This aspect of environmental economics is dealt with, among others, by: A. Białaczewska, A. Bolewski, J. Dembowski, A. Jankowska-Kłapkowska, R. Ney, K. Wanieliasta.

<sup>4</sup> This type of research is carried out, inter alia, by: W. Goetl, A. Kassenberg, J. Kolipiński, S. Kozłowski, A. Kukliński, W. Szafer.

area<sup>5</sup> examines the effectiveness of achieving specific socio-economic goals in terms of micro and macroeconomics (Czaja, 1993).

Europe's rural areas are considered to be unique, in need of protection, and of great diversity of cultural, economic, and social value. Therefore, their development should include all the socioeconomic activities occurring in their area. Considering the features of the natural environment, one can distinguish rural areas with special natural values, i.e., "Valuable in terms of nature"<sup>6</sup>, and therefore also having a large tourist potential. It should be noted that the condition and resources of the natural environment and the manner of its development largely determine the landscape values of a given area, therefore they can both raise and lower its attractiveness in terms of tourism, recreation, as well as economy and innovation. Natural areas are areas of high biodiversity, rich in natural resources, as well as landscape and cultural resources, which deserve to be maintained in a state of relative durability. There are various criteria for the valorization of naturally valuable areas, such as the beauty of the landscape, the quality and specific use of land, microclimate, air purity, and resources of animate and inanimate nature. The main purpose of designating areas of natural value is the protection of existing natural resources. It determines starting and running a business (agricultural and non-agricultural) and influences the choices made by local governments and residents, including those regarding investment activities (Jalinik, 2002; Rowiński, 2006; Degórska, 2007; Zielińska, 2008; Kutkowska, 2010; Czudec, 2011; Nowacka-Rejzner, 2011; Lipińska, 2013; Musiał, 2017).

It should be added that in environmentally valuable rural areas, there is a basic dilemma, i.e., how to preserve the values of the natural environment, while using their resources for the implementation of development in the social and economic sphere. In fact, the implementation of development should be based on the specificity of a given area and, in this case on the values of the natural environment. However, launching such a process requires a comprehensive approach (from the international level at the European Union level to the local level) and structural adjustments, which in turn will not be possible without significant, purposeful external support. Otherwise, there will be an imbalance between the potential of these areas and its activation and use (Ślusarz, 2011).

Areas of high natural value perform a variety of functions, which generally include ecological, socio-cultural, and economic benefits. The policy of the local government (commune), which relates to the shaping of the natural system and the protection of natural values, is mainly responsible for the maintenance and implementation of these functions at the appropriate level, which is also aimed at shaping the cultural landscape of a given area that was there it has been recorded for centuries and testifies to the local identity. Maintaining a landscape characterized by high natural attractiveness requires considering its values in planning, design, and implementation activities, primarily in order to reduce or even eliminate the investment pressure on such areas. It constitutes a great threat to the preservation of important functions of naturally valuable areas in the future, especially those defined as ecological and socio-cultural (Musiał, 2017).

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<sup>5</sup> This area of environmental economics is dealt with, inter alia, by: A. Budnikowski, B. Fiedor, A. Ginsbert-Gebert, K. Górka, S. Łojewski, B. Poskropko, B. Prandecka, T. Żylicz.

<sup>6</sup> In the literature, naturally valuable areas are treated as a synonym for legally protected areas. This is due to the fact that the best way to preserve valuable natural areas is to grant them a protective status (Dobrzańska, 2007; Cieszewska, 2008; Musiał, 2017).

On the one hand, naturally valuable areas may constitute a barrier to the functioning, development and free economic activity (agricultural and non-agricultural) as well as local self-government (commune) and inhabitants, and also for the implementation of investments, slowing down or even stopping the local socio-economic development. However, on the other hand, they can stimulate this development, especially through appropriate exposure and use of existing values (natural, landscape, tourist, recreational, and recreational as well as historical, cultural etc.), of course, provided that their durability is maintained (Lipińska, 2013).

The financial management of local government is a complex process, conducted in compliance with the legislative requirements within the local government budget. Ensuring the efficient and proper operation of this specific economy, which consists mainly of cash and property resources, requires strict compliance with many legal acts, standards, and budgetary principles. As part of the monetary management of local government, various public tasks and financial operations are carried out, relating to individual departments of public finance, with various legal and financial methods and instruments used (Chojna-Duch, 2003; Kosek-Wojnar, Surówka, 2007; Sołtyk, 2017; Sołtysiak, 2017; Sołtysiak, Suraj, 2018).

The financial management of the commune includes collecting income and revenues, as well as making expenses and expenditures in order to perform own and commissioned tasks. It determines its development and competitiveness and secures the fulfillment of the residents' needs. In assessing the income of the commune's budget, it is important to study changes in its amount, its dynamics, and structure as well as spatial differentiation. On the other hand, on the basis of the analysis of the expenditure, it can be determined to what extent the funds are allocated to solving current problems and to what extent to the promotion and development of the commune, as well as the improvement and increase of its competitiveness. It should be added that the analysis of the spatial differentiation of the level of budget revenues shows that high incomes of communes are not only the result of the resourcefulness of local government authorities, but also, for instance, of the location of capital and enterprises, changes in population, the condition of infrastructure, neighborhood or presence of cities, and tourist attractiveness (Podstawka, 2005; Hybel, 2010).

Investment expenditures in the financial economy of communes, apart from their own income, are an important factor characterizing their development possibilities. The wealth of communes clearly affects their investment opportunities. Units with higher budgetary income per capita usually also have greater investment opportunities. Moreover, the greater share of own revenues in total budget revenues allows local governments of communes to dispose of financial resources more freely, and thus creates the possibility of allocating larger amounts for investments. It is also important from the point of view of the municipalities' income independence. Income independence, understood as the provision of self-government units with their own sources of income and their free disposal, is precisely measured by the share of own income in the total amount of budget income. This type of income allows the local government to conduct its own income policy, while the external supply of their budgets in the form of subsidies and subsidies is a form of state's direct influence on local government finances (Gołaszewska-Kaczan, 2005; Sobczyk, 2010; Dziemianowicz, Kargol-Wasiluk, Bołtromiuk, 2018; Czudec, 2021; Szolno-Koguc, 2021).

The implementation of investments by municipalities is one of their most important public tasks, as it satisfies the basic needs of local self-government communities and contributes to their development. In investment processes implemented by municipalities,



there is a great difficulty in objectively assessing the effective allocation of resources, which results from the complexity of investment projects, the distribution of their effects and outlays over a long period of time, the multifaceted impact of investments on the environment, the multiplicity of investment stakeholders, and the occurrence of divergent interests between them. The specificity of this type of investments is their continuity, which means that the expenses for their implementation are systematically charged to the budget of a given local government unit, and the growing needs in this area make it necessary to look for sources of financing. Therefore, it is important that the investment effectively and efficiently meets social expectations and needs, but also does not adversely affect the financial situation of a local government unit, which could reduce its potential for further investments. In this way, a kind of closed system is created, in which the previously undertaken and implemented investments largely determine the potential and possibility of implementing subsequent investments. Therefore, it is important that local government units, when implementing a specific investment policy, consider both its socio-economic and budgetary effects (Filipiak, 2011; Błachut, Cierpień-Wolan, Czudec, Kata, 2018).

The financial situation of a commune constitutes its financial condition in a specific time period, resulting from its income and its structure, expenses and their structure, the degree of use of repayable funds, activity, and effectiveness in obtaining extra-budgetary funds, as well as the efficiency of managing financial and material resources. Local authorities should care about good financial situation of a given territorial unit, as it is an element of its competitiveness adding to the factors such as the ability to perform tasks, achieving budget balance, increasing assets and implementing and meeting the needs of its residents. Among a number of various conditions shaping the financial economy of a local government unit, including its financial situation, the most general include exogenous, endogenous, and mixed conditions. In addition, it is also possible to distinguish certain common categories, such as social, economic, environmental, and spatial conditions, as well as institutional, legal, and political conditions. The catalog of such factors is sometimes extended to include unexpected events, the consequences of which cannot be predicted, and which may fundamentally change the economic situation and the operating conditions of local government units. This event in 2020 was the appearance of the coronavirus pandemic (Ossowska, Ziemińska, 2010; Świrska, 2016; Bień, 2017; Standard, 2017; Stanny, Strzelczyk, 2018; Wójtowicz, 2018; Czudec, 2021).

According to research, the coronavirus pandemic reduced the financial stability of local government units. This is evidenced primarily by the reduction in the importance of tax revenues in the structure of their budget revenues, as well as limiting investment activity, especially in a situation where the vast majority of local governments ended 2020 with a budget surplus, and the dynamics of income growth was similar to their dynamics in the previous year. The factor that significantly improved the financial situation of local government units during the pandemic was the launch of the Government Fund for Local Investments, which, though varied depending on individual voivodeship, nevertheless, increased the total amount of budget revenues intended for investments. Due to the fact that the funds from this Fund went to local governments only in the second half of 2020, it was not possible to use them to finance investment tasks this year, and this in turn contributed to the creation of a budget surplus. Therefore, the real effect of launching the Fund should be visible in the coming years, and its manifestation should be the increased investment activity of local governments (Czudec, 2021).

## 2. PURPOSE, EMPIRICAL MATERIAL AND RESEARCH METHODS

The aim of the article is to identify and assess the financial situation of naturally valuable rural communes in Poland in comparison to other rural communes and the whole country.

The article presents a research hypothesis that assumes that local governments of naturally valuable rural communes in Poland use their natural resources appropriately and successfully cope with the existing difficulties related to the need to protect nature, thus achieving similar economic and financial results compared to other rural communes in the country.

The empirical material of the article concerns the entire country, as well as all rural communes in Poland. The figures come from the Local Data Bank of the Central Statistical Office in Warsaw and concern the years 2019–2021. The collected and structured empirical material was developed in a descriptive, tabular, and graphical form, using the method of comparative analysis.

To identify and assess the financial situation of rural communes in Poland, the following diagnostic characteristics that illustrate it in 2019–2021 were analyzed:

- total revenues of communes' budgets per capita (PLN);
- own revenues of communes' budgets per capita (PLN);
- share of own revenues in total revenues of communes' budgets (%);
- total expenditure of municipalities' budgets per capita (PLN);
- investment expenditure of municipalities' budgets per capita (PLN);
- share of investment expenditures in total expenditures of communes' budgets (%).

The article provides a point assessment of all diagnostic characteristics that illustrates the financial situation of naturally valuable rural municipalities in Poland compared to other rural municipalities and the whole country for the years 2019–2021. Individual diagnostic characteristics were compared with the average for the country, which was set at 100 points, and their prevalence or underweight was assessed respectively in all rural communes. Then, all points were summarized, and the mean was calculated (Chart 1). It should be emphasized that this is a new approach to the research problem discussed in the article.

## 3. RESEARCH RESULTS

When analyzing the environmental conditions of the economy and the financial situation of rural communes in Poland, it was assumed that the main feature in this respect is the share of legally protected areas in the total area. Therefore, all rural communes in Poland have been divided into two groups, i.e., rural communes, the so-called “Valuable in terms of nature” and other rural communes.

In Poland, the share of legally protected areas in the total area is quite high – 32.3%. However, the percentage of naturally valuable rural communes is rather small, as it amounts to 13.5% of all rural communes (Table 1).

The basic condition for effective and efficient implementation of their statutory tasks by municipalities is to ensure stable budget revenues, not only allowing for the financing of current expenses, but also allowing for undertaking new investment tasks (Czudec 2021).

In rural municipalities in Poland, the average value of total incomes in municipal budgets per capita in 2019–2021 is lower than the national average, which is PLN 6555.3. However, there is a variation between rural communes in this respect, with the average value of total incomes in communes' budgets per capita in 2019–2021 being slightly higher in the group of environmentally valuable communes. In all separated groups of rural

communes, the differentiation of the characteristic between particular communes is small and, therefore, its variability is low, and it is the lowest in the group of environmentally valuable rural communes, that is, this group of communes is the most homogeneous in this respect (Table 1).

Table 1. Total revenues of rural municipalities budgets *per capita* in Poland in 2019–2021 (in PLN)

Specification	Total rural communes	Group of rural communes	
		Naturally valuable communes	Other communes
Number of communes	1523	206	1317
Mean	5981.4	6109.0	5961.5
Volatility coefficient V (%)	21.7	14.5	22.7
Minimum	4322.2	4611.4	4322.2
Maximum	43632.4	10267.8	43632.4

Source: (Local Data Bank of the Central Statistical Office in Warsaw).

Rural communes in Poland are characterized by a clearly lower average value of the own incomes of the commune budgets per capita in 2019–2021, compared to the average for the entire country, which is PLN 3,198.5. It should be noted, however, that there are differences in this regard between rural communes. The average value of the own income of rural communes' budgets per capita in 2019–2021 is slightly lower in the group of naturally valuable communes. In all separated groups of rural communes, the differentiation of this characteristic between particular communes is high, i.e., its variability is also high, but it is the smallest in the group of naturally valuable rural communes, i.e., this group of communes is the most homogeneous in this respect (Table 2).

Table 2. Own revenues of rural commune budgets *per capita* in Poland in 2019–2021 (in PLN)

Specification	Total rural communes	Group of rural communes	
		Naturally valuable communes	Other communes
Mean	2159.0	2051.5	2175.8
Volatility coefficient V (%)	62.7	49.5	64.3
Minimum	788,5	901.5	788.5
Maximum	39046.3	7241.6	39046.3

Source: (Local Data Bank of the Central Statistical Office in Warsaw).

On average, the share of the own income in the total income of the budgets of rural municipalities in Poland in 2019–2021 is definitely lower than the national average, which amounts to 48.8%. However, there is a differentiation between rural communes in this respect; on average, the share of own income in the total income of communes' budgets in 2019–2021 is slightly lower in the group of naturally valuable communes. In all separated groups of rural communes, the differentiation of this characteristic between particular communes is rather small and very similar, and therefore its variability is low (Table 3).

Table 3. Share of own income in total income of the budgets of rural communes in Poland in 2019–2021 (in %)

Specification	Total rural communes	Group of rural communes	
		Naturally valuable communes	Other communes
Mean	35.2	32.8	35.5
Volatility coefficient V (%)	30.3	32.9	29.8
Minimum	15.4	16.8	15.4
Maximum	89.5	72.2	89.5

Source: (Local Data Bank of the Central Statistical Office in Warsaw).

In rural municipalities in Poland, the average value of total expenditure in municipal budgets per capita in 2019–2021 is lower than the average for the country, which is 6445.4 PLN. However, there is a variation between rural communes in this respect, and the average value of total expenditure in communes' budgets per capita in 2019–2021 is slightly higher in the group of naturally valuable communes. In all separated groups of rural communes, the differentiation of this feature between particular communes is small, and therefore its variability is low, and it is the lowest in the group of environmentally valuable rural communes, i.e., this group of communes is the most homogeneous in this respect (Table 4).

Table 4. Total expenditure of rural communes' budgets per capita in Poland in 2019–2021 (in PLN)

Specification	Total rural communes	Group of rural communes	
		Naturally valuable communes	Other communes
Mean	5671.0	5753.4	5658.2
Volatility coefficient V (%)	23.2	15.5	24.2
Minimum	3882.0	4235.3	3882.0
Maximum	43601.4	9859.7	43 601.4

Source: (Local Data Bank of the Central Statistical Office in Warsaw).

Rural communes in Poland are characterized by a similar average value of investment expenditure in commune budgets per capita in 2019–2021, as in the rest of the country (PLN 941.0). However, there is a differentiation in this respect between rural communes, because the average value of investment expenditure of communes' budgets per capita in 2019–2021 is slightly higher in the group of naturally valuable communes. In all separated groups of rural communes, the differentiation of this feature between particular communes is high, i.e., its variability is also high, however, it is the smallest in the group of environmentally valuable rural communes, i.e., this group of communes is the most homogeneous in this respect (Table 5).

Table 5. Investment expenditure of rural commune budgets per capita in Poland in 2019–2021 (in PLN)

Specification	Total rural communes	Group of rural communes	
		Naturally valuable communes	Other communes
Mean	917.2	954.5	911.4
Volatility coefficient V (%)	62.6	54.4	63.8
Minimum	48.7	94.0	48.7
Maximum	12556.7	3793.7	12556.7

Source: (Local Data Bank of the Central Statistical Office in Warsaw).

On average, the share of investment expenditure in the total expenditure of the rural municipalities in Poland in 2019–2021 is similar to the average for the entire country, where it amounts to 14.6%. There are also no major differences in this respect between the separated groups of rural communes. Moreover, in all of them the differentiation of this feature between particular communes is quite large and almost identical, that is, its variability is average (Table 6).

Table 6. The share of investment expenditure in the total expenditure of the budgets of rural municipalities in Poland in 2019–2021 (in %)

Specification	Total rural communes	Group of rural communes	
		Naturally valuable communes	Other communes
Mean	15,6	16,0	15,5
Volatility coefficient V (%)	40,6	40,7	40,6
Minimum	1,1	2,0	1,1
Maximum	41,3	40,5	41,3

Source: (Local Data Bank of the Central Statistical Office in Warsaw).

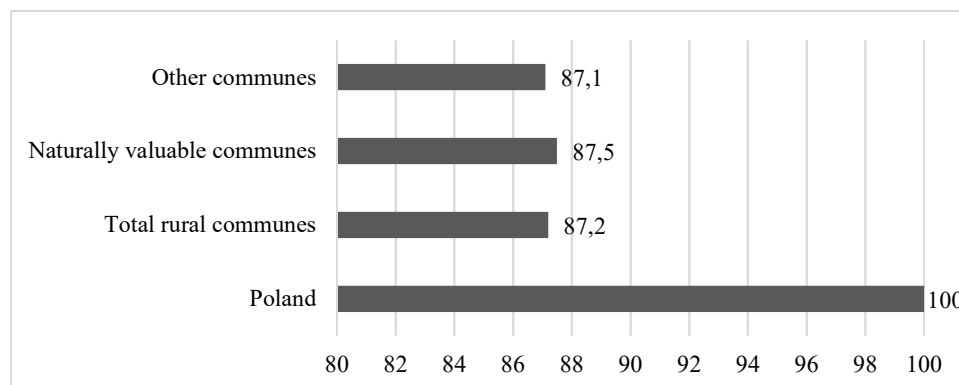


Chart 1. Scoring of the financial situation of environmentally valuable rural communes in the background of other rural communes in Poland and the country for 2019–2021 (Poland = 100.0 points)

Source: (Local Data Bank of the Central Statistical Office in Warsaw).

Chart 1 shows the results of the scoring on the financial situation of environmentally valuable rural communes against the background of other rural communes in Poland and the entire country for the years 2019–2021. It should be noted that rural communes in Poland are characterized by a worse financial situation on average, compared to the average for the whole country, and there are no major differences in this respect between the specific groups of these communes.

#### 4. CONCLUSIONS

The environmental conditions of the economy and the financial situation of rural communes in Poland analyzed in the paper (i.e. the share of legally protected areas in the total area) do not play a significant role in this respect, nonetheless it is a positive one. Namely, in the group of environmentally valuable rural communes, there is a slightly higher average level of total income of communes' budgets per capita, as well as a slightly higher average level of total expenditures and investment expenditures of communes' budgets per capita compared to other rural communes, with less diversification of these characteristics between particular communes, which means that the separated group of environmentally valuable rural communes is more homogeneous in this respect.

The local governments of naturally valuable rural communes in Poland use the resources of the natural environment, and successfully cope with the existing difficulties and barriers related to the need to protect nature, achieving similar, and sometimes even slightly better economic and financial results in comparison with other rural communes in the country. Thus, it confirms the research hypothesis presented in the work.

However, the scoring of the financial situation of naturally valuable rural communes compared to other rural communes in Poland and the entire country showed that rural communes in Poland are characterized by an average worse financial situation, as the national average, and it is very similar in all the analyzed work for groups of these communes.

Therefore, it can be concluded that the share of legally protected areas in the total area, being an important feature of the natural environment, is not of great importance for shaping

financial situation of rural communes in Poland, but – as already mentioned – it may play a positive role in this regard.

It should be added that the presented results of statistical data analysis provide significant and up-to-date knowledge, which may be useful primarily for local government officials responsible for public local government finances as well as opportunities and directions in local socioeconomic development of rural communes, as well as for decision makers who implement regional development policy in Poland. At the same time, it justifies the need to continue similar research and analyzes.

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## RUSSIA AND GERMANY AGAINST THE BACKGROUND OF THE THREE SEA INITIATIVE STATES FROM 1993 TO 2021 IN A POWERMETRICS PERSPECTIVE

This article presents the powers of Russia and Germany against the backdrop of a group of 12 countries that launched a new organization in Europe in September 2015 called the Three Seas Initiative. Member states try to create a counterbalance, and at the same time compete with two great countries: Germany and the Russian Federation (Russia). The members of the Three Seas Initiative are small and medium-sized entities on the European scene. The aim of the article was to indicate the power of the examined entities of the international relations of Russia and Germany against the background of the countries forming the Three Seas Initiative. The article uses the methodology developed by Professor Sulek to study the power of the indicated countries.

**Keywords:** Powermetrics, The Three Seas Initiative, power of states, Russia, Germany.

### 1. INTRODUCTION

International rivalries in the modern world are gaining momentum. This is evidenced by the wars of the Russian Federation against Georgia (2008), Ukraine over the Donbas and Crimea (2014) and the latest newly launched war against Ukraine from February 2022, the US-China rivalry, the militarization of the world and the increase in military spending among major geopolitical actors, the emergence of hybrid threats, competition for resources or attempts to gain an economic advantage over other states. States continue to play a central role in international relations. Despite the terms about the “end of history” of the early 21st century created by Francis Fukuyama, among others, changes in the balance of power in the world are progressing all the time. We can describe it as a struggle for power, which is characterized by cooperation, struggle or rivalry. The Cold War and changes in the world after 1991 led to the formation of new conditions of cooperation and rivalry, and sometimes struggle. The game of interests is leading to the formation of a new balance of power in Europe as well. Traditionally, Germany and Russia have been playing a large geopolitical role. They are trying to oppose them, especially the smaller Central European states, which are striving to improve their international position. This is fostered by participation in various international organizations that strengthen their states, economies or military

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potential. Such a new alliance, which brings together more than a dozen Central European countries including Poland, is The Three Seas Initiative<sup>2</sup>. It rivals the power of both Germany and Russia.

The statistical base of the paper was based on data from the World Bank, the International Monetary Fund (IMF). The data on the number of active duty troops and military spending in U.S. dollars were obtained in part from “The Military Balance” yearbooks published by the London-based International Institute for Strategic Studies (IISS) and World Bank data.

The purpose of the paper is to present the powermetrics position of Germany and Russia against the background of the individual states that make up the Three Seas Initiative, as well as nominally the entire Initiative. The calculations were based on Professor Mirosław Sułek's methodology for calculating the powers of states, which used synthetic measures of power. Few similar formal models currently exist in the world that allow calculating the power of states based on objective criteria. The subject of the study was the general, military and geopolitical power of the indicated states and the Three Seas Initiative as a whole. The subject matter of the article falls within the scope of security/geopolitics and, in particular, powermetrics. The growing importance of Central Europe in the current times, including interest in new political and economic initiatives that affect the geopolitical situation in the region are the main reasons for writing this article. In order to achieve the goal, the general, military and geopolitical power for the Three Seas Initiative countries, and Germany and Russia from 1993–2021 was calculated on the basis of statistical data. The structure of the paper is based on the following characteristics: The Three Seas Initiative, the role of Germany and Russia in this part of Europe, the balance of power, power and the Sułek's model, the dynamics of changes in power indicators.

## 2. ARRANGEMENT OF FORCES

In the international arena, the balance of power plays the most important role in relations between states, which thus has a major bearing on the security of the actors in international relations, and also influences the security strategies that states create. The balance of forces is the most important feature of any international system, as stated by Raymond Aron (Aron, 1995). If relations between actors have certain forces, then we can talk about the balance of power, which can be local, regional or global. Jerzy Stańczyk stated that the balance of power “constitutes a power and interest-based, dynamic system of international relations, determined by geopolitical conditions, in which rivalries, differences and contradictions of interests become particularly important” (Stańczyk, 2018). Actors in the balance of power can achieve growth, remain stable or decline. Estimates of the power relations within a given alignment strengthen and guide states to pursue profitable foreign policies vis-à-vis other actors, and in particular to gain more power from others, since the power game is a zero-sum game.

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<sup>2</sup> The Three Seas Initiative (3M for short, as well as 3S, 3SI or TSI, and BABS (Baltic, Adriatic, Black Sea Initiative); Lat. Trimarium).

### 3. GERMANY, RUSSIA AND THE 3SI STATES – ACTORS OF INTERNATIONAL RELATIONS AND THEIR RELATIONS

In Europe, since the end of World War II, Germany (West Germany) (also within the European Union) and the Russian Federation, with its vast territory, energy resources and conventional and nuclear potential, have been very important. In between these two powers there is a number of smaller and medium-sized countries on a European scale, which are also involved in the struggle for power. International organizations also serve this purpose; participation in them by Central European countries strengthens them and multiplies their resources. Such a role is also played by the 3SI, which brings together 12 entities. All of them also belong to the European Union and, with the exception of Austria, to the North Atlantic Treaty Organization (NATO). Germany, too, is a member of the EU and NATO, having enjoyed the virtues of these organizations for many decades, and additionally has observer status in the 3SI. Russia has strengthened its position in recent years on the basis of rising energy commodity prices, the funds thus raised allowed it to launch the current attack on Ukraine. Moscow's position has also been strengthened by its contacts with China and other BRICS members. Vladimir Putin's economic dealings with Berlin had a big impact on his rise to prominence, which has only now been halted as a result of Russia's war with Ukraine. In this geopolitical situation, only cooperation between small and medium-sized countries in Europe can make the Trilateral countries more important. However, they must, especially in the current situation, cooperate within NATO and the EU.

The location of the 3SI between Germany (Western Europe), Russia and Turkey is its strength and makes it a geopolitical region. Globally, the area is of interest to both the US and China, as well as Germany and Russia. This is influenced by the rapid economic development of the countries in the region, the need for energy resources, as well as political ambitions to play an increasingly important role in this part of Europe, at the expense mainly of Russian and German interests (Zhigao, 2020). The 3SI countries also constituted a wedge separating Germany from the Heartland (Russia) after World War I and vice versa, hindering the expansion of these countries (Świder, 2018).

The formation of the 3SI in a new way created a horizon for looking at the countries of Central and Eastern Europe<sup>3</sup> expanded to include the countries of Southern Europe, between the three seas of the Baltic, Adriatic and Black Sea. The first attempts to undertake such an Initiative were held on September 29, 2015 in New York, while the formal First Trilateral Summit was held on August 25–26, 2016 in Dubrovnik (Ukielski, 2018). The establishment of the organization was intended to strengthen ties in the wider Central European region, which would create a sustainable foundation for economic development in energy, transportation, digital communications, and the economy. The initiative creates a forum for cooperation between 12 countries: Austria, Bulgaria, Croatia, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia and Slovenia. The area encompassing the countries of the Trilateral Initiative accounts for almost a third of the total area of the European Union.

The main goal of the new initiative is to focus on a coherent and well-integrated infrastructure, digitalization, and energy development in Central Europe, which will make

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<sup>3</sup> In Polish science, the concept of Oskar Halecki has been adopted, according to which Central and Eastern Europe is the eastern part of Central Europe, located between Sweden, Germany, Austria and Italy on the one hand, and Turkey and Russia on the other (Halecki, 2002).

up for the development backwardness resulting from the historical past. The next Three Seas Initiative Summits were held: July 6–7, 2017 in Warsaw (the summit was co-hosted by the presidents of Poland Andrzej Duda and Croatia Kolinda Grabar-Kitarović, and the special guest was US President Donald Trump); September 17–18, 2018 in Bucharest (declarations were signed on the establishment of the Network of the 3SI Chambers of Commerce, a letter of intent was signed on the establishment of the 3SI Fund); June 5 and 6, 2019. in Ljubljana (a declaration was adopted confirming the formal registration of the Trilateral Initiative Investment Fund); October 19–20, 2020 in Tallinn (a declaration of increased commitment to the 3SI Investment Fund was signed); and July 8–9, 2021 in Sofia (U.S. support was secured, implementation of the Via Carpatia road route, Estonian plan to build a joint cyber security system) (The 3 SI – The Ministry of Foreign Affairs – <https://www.gov.pl/web/dyplomacja/trojmorze>; Prezydent.pl – [www.prezydent.pl/aktualnosci/wizyty-zagraniczne](http://www.prezydent.pl/aktualnosci/wizyty-zagraniczne)). On January 12, 2021, during Moldovan President Mai Sandu's foreign visit to Kiev, a declaration was signed with Ukrainian President Volodymyr Zelenskiy, in which the two countries declared their interest in participating in the Three Seas Initiative (Ukraine, Moldova willing to join Three Seas Initiative, [www.ukrinform.net](http://www.ukrinform.net)). After not long and in the face of Russian aggression in Ukraine, the next Trilateral Summit in Riga (June 20–21, 2022) decided that Ukraine would be a participating partner in the Initiative (Siódmy szczyt Inicjatywy Trójmorza w Rydze – <https://pism.pl/publikacje/siodmy-szczyt-inicjatywy-trojmorza-w-rydze>).

There is extensive literature on the Three Seas Initiative, which may extend the reader's knowledge to a different extent than the one presented in this article: (Lach 2020; Dobija, 2019; Baziur, 2018; Zenderowski, 2021; Soroka, Stępniewski, 2019; Pawłowski, Jakóbowski, 2020).

The geopolitical position of the Three Seas Initiative countries has a significant impact on ensuring security in the region. It has historically been a safety buffer for the powers and states in this part of Europe. Threats came mainly from Germany and Russia, and before the 19th century also from the Ottoman Empire. The remedy for this were the integration processes from the interwar period, which are particularly visible today with the accession to the European Union or NATO. The threat from Russia caused Poland and Romania to take action aimed at increasing the level of defense of the eastern flank of the North Atlantic Alliance and intensifying military cooperation, which was the basis for the establishment of the so-called The Bucharest Nine, which includes most of the Three Seas countries except Austria, Croatia and Slovenia. Energy, which is a basic, modern element of security policy, plays a large role in cooperation between states (Wojtaszak, 2020).

The multiplicity of entities forming the Three Seas Initiative also causes differences in the approach to certain matters. We can count the issues of energy, logistics, regional policy and the attitude towards the most important actors in international relations – Russia, the USA, Germany and China – as nothing. Some discrepancies have become apparent with Russia's war with Ukraine in recent months. Among the countries of the Three Seas Initiative, cooperation between Hungary and Austria in the field of energy with Russia is particularly visible. Also, Budapest, despite belonging to the Three Seas Initiative, is trying to develop its own regional projects in the field of e.g. communication in the Danube valley competitive to Poland (Zenderowski, 2021). The events related to Russia's aggression also made Germany aware that important geopolitical matters in Europe are moving to the East, Berlin realizes that it must have an impact on the development of events in this area, and the Three Seas Initiative threatens its interests on the one hand, but also participation in it

whether controlling it can reduce the negative political effects on Germany. Germany's observer status in the Three Seas Initiative makes Berlin try to increase its position in the Initiative at all costs (Dahl, 2018; Niemcy chciałyby kontrolować ideę Trójmorza – <https://congress.lubelskie.pl/niemcy-chcialyby-kontrolowac-idee-trojmorza>).

#### 4. THE POWER OF GERMANY, RUSSIA AND THE THREE SEAS COUNTRIES IN THE SULEK'S MODEL (DYNAMICS OF CHANGES IN POWER INDICATORS)

When comparing the power of states, it should be considered on a general level, using constant and measurable parameters in a given time unit, a specific space and the people who create them.

A synthetic assessment of the balance of power in quantitative terms shows two categories of power: general and military, and economic (general) power consists of farming results (gross domestic product), demographic factors (population) and spatial components (territorial area). Military power consists of military-economic factors (military expenditures, which are part of GDP), demographic-military factors (number of soldiers in active service) and spatial factors (territorial area). Geopolitical power is calculated as the arithmetic average of the economic (general) power and the doubled military power (the role of the military factor in shaping the current balance of power was appreciated). Relations between political units are relations between the people who make them up and take the form of cooperation, struggle and rivalry.

The obtained data on the above-mentioned factors are divided by the appropriate global values, and the obtained fractional values are entered into the formula. After performing the operation, we will get the power of states as a fraction of the world power. In international relations, the most important feature is the balance of power.

- $P_e = PKB^{0,652} \times L^{0,217} \times a^{0,109}$
- $P_w = W^{0,652} \times S^{0,217} \times a^{0,109}$
- $P_g = \frac{P_e + (2 \cdot P_w)}{3}$

Symbols:  $P_e$  – economic power (general),  $P_w$  – military power,  $P_g$  – geopolitical power, GDP – *gross domestic product*,  $L$  – population,  $a$  – territory,  $W$  – military expenditure,  $S$  – number of soldiers in active service

The indicated model is a priori-deductive in nature. The power exponents used by Professor Sułek are related to the golden ratio of the segment<sup>4</sup>. Power in these three dimensions is also power – a stream of energy and means the amount of work done per unit of time (Sułek, 2004; Kiczma, Sułek, 2020). The obtained fractions can be multiplied by

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<sup>4</sup> “Golden section (Latin *sectio aurea*), harmonic division, golden ratio, divine proportion (Latin *divina proportio*) – division of a section into two parts so that the ratio of the length of the longer of them to the shorter one is the same as that of the entire section to the longer part. In other words: the length of the longer part is to be the geometric mean of the length of the shorter part and the whole segment. For more see: [https://pl.wikipedia.org/wiki/Z%C5%82oty\\_podzia%C5%82#cite\\_note-1](https://pl.wikipedia.org/wiki/Z%C5%82oty_podzia%C5%82#cite_note-1) (14.04.22); <https://encyklopedia.pwn.pl/haslo/4001815> (Access: 14.04.2022).

any numbers, if we multiply them by 100, we will get the results in percent of world power (then world power = 100). In our case, it will be more convenient to multiply them by 1000 (then the power of the world = 1000), which means that we will express it in millimirs (abbreviation mM), i.e. thousandths of the world power. The statistical base of the article is based on data from the World Bank, the International Monetary Fund (IMF). The data on the number of soldiers in active service and military spending in US dollars were obtained in part from the yearbooks “The Military Balance” published by the London-based International Institute for Strategic Studies (IISS) and data from the World Bank.

This subchapter will present the dynamics of the parameters needed to calculate the power of countries, i.e. GDP, population (I assumed the area of countries to be constant). They will be converted into world shares, because this is the only way to show the actual increases and decreases in parameters and powers. Then, the results regarding the increases and decreases in the general, military and geopolitical power of Germany, Russia and the Three Seas countries will be presented. Table 1 presents the GDP of the Russian Federation, Germany and the Three Seas countries.

Table 1. World share of the Russian Federation, Germany and the Three Seas countries in terms of GDP

<b>Country</b>	<b>1993</b>	<b>2000</b>	<b>2010</b>	<b>2021</b>
<b>Austria</b> in % of the world	<b>0.737<sup>1</sup></b>	<b>0.582</b>	<b>0.589</b>	<b>0.507</b>
<b>Bulgaria</b> in % of the world	<b>0.042</b>	<b>0.039</b>	<b>0.076</b>	<b>0.082</b>
<b>Croatia</b> in % of the world	<b>0.050<sup>1</sup></b>	<b>0.065</b>	<b>0.091</b>	<b>0.067</b>
<b>The Czech Republic</b> in % of the world	<b>0.409</b>	<b>0.373</b>	<b>0.260</b>	<b>0.292</b>
<b>Estonia</b> in % of the world	<b>0.007<sup>1</sup></b>	<b>0.017</b>	<b>0.029</b>	<b>0.038</b>
<b>Lithuania</b> in % of the world	<b>0.029<sup>1</sup></b>	<b>0.034</b>	<b>0.056</b>	<b>0.066</b>
<b>Latvia</b> in % of the world	<b>0.011<sup>1</sup></b>	<b>0.024</b>	<b>0.036</b>	<b>0.039</b>
<b>Poland</b> in % of the world	<b>0.372</b>	<b>0.509</b>	<b>0.722</b>	<b>0.690</b>
<b>Romania</b> in % of the world	<b>0.102</b>	<b>0.110</b>	<b>0.250</b>	<b>0.303</b>
<b>Slovakia</b> in % of the world	<b>0.064</b>	<b>0.086</b>	<b>0.136</b>	<b>0.123</b>
<b>Slovenia</b> in % of the world	<b>0.064<sup>1</sup></b>	<b>0.060</b>	<b>0.072</b>	<b>0.064</b>
<b>Hungary</b> in % of the world	<b>0.155</b>	<b>0.140</b>	<b>0.199</b>	<b>0.191</b>
<b>Germany</b> in % of the world	<b>8.021</b>	<b>5.746</b>	<b>5.108</b>	<b>4.456</b>



Table 1 (cont.). World share of the Russian Federation, Germany and the Three Seas countries in terms of GDP

Country	1993	2000	2010	2021
<b>Russia</b> in % of the world	<b>1.685</b>	<b>0.768</b>	<b>2.294</b>	<b>1.735</b>
<b>The 3 Seas countries together</b> in % of the world	<b>2.043</b>	<b>2.039</b>	<b>2.517</b>	<b>2.461</b>

Source: (own study based on data from the World Bank).

<sup>1</sup> Source: ([www.countryeconomy.com/gdp?year=1993](http://www.countryeconomy.com/gdp?year=1993) [Access: 14.03.2022]).

Gross domestic product (GDP) as a qualitative parameter indirectly expresses the level of productivity, i.e. the scale of economic development. In 1993, the countries of the modern Three Seas Initiative had a GDP of USD 527 billion, Germany at that time had a four-fold advantage in this respect, Russian GDP was lower by USD 92 billion. Among the individual countries in 1993, Austria had the largest GDP – 190 billion, the Czech Republic – 105 billion and Poland – 96 billion. On a global scale, the German economy at that time had a share of 8%, the Three Seas countries as a whole 2%, and Russia 1.68%. Economic transformations in this part of Europe after the Autumn of Nations led in the following decades to large economic growth and GDP of the countries forming the Three Seas Initiative. It is worth mentioning here that the Three Seas Initiative countries maintained their percentage position in the world in the analyzed period, from 2% in 1993, through 2.52% in 2010 and 2.46% in 2021. During this period, global GDP increased 3.68 times. The share of German GDP in the world fell in the analyzed period from 8% to 4.46%. Russia's GDP as a percentage of the world ranged from 1.69% in 1993, through 0.77% in 2000, 2.29% in 2010, to 1.74% in 2021. For all years surveyed, GDP of Central European countries exceeded the GDP of Russia, the largest number in 2000 was 2.7 times. In relation to Germany's GDP, a constant upward trend can be observed in the share of the Three Seas' GDP - from 25.45% in 1993 to 55.22% in 2021. Over the next 30 years, the situation related to the development of economies in Europe has changed dramatically. Global GDP increased from USD 26 trillion in 1993 to USD 95 trillion in 2021, and the share of individual countries belonging to the Three Seas Initiative, as well as Russia and Germany, changed at that time. In 2021, the GDP of Germany was USD 4 trillion 230 billion, Russia USD 1 trillion 647 billion, and the Three Seas countries USD 2 trillion 336 billion.

In the historical development of countries, the number of people has always had a great influence on their economic and military power. In recent decades, both in Europe and in Russia, one can talk about a demographic crisis. Only some countries are excluded from this, for example Germany, which has improved its demographic situation mainly thanks to migrants. In the analyzed period (Table 2), a significant decrease in the population of Russia by 2.5 million can be indicated. Even greater losses were suffered by the Three Seas region as a whole, by as much as 7 million. Bulgaria, Croatia, the Baltic states, Romania and Hungary were among the most depopulated countries. Also, the demographic perspective for Poland does not look good for the coming decades. In order to maintain the position of its economy, Germany had to strengthen its demographics through successive influxes of migrants, also from Africa in the Middle East. The population potential of the Three Seas

Initiative is significant and is not inferior to the main players in this part of Europe. In 1993, the population advantage over Germany was 36 million, and in 2021 it was less than 27 million. It is, therefore, a large economic market where significant volumes can be achieved, inter alia, in terms of trade. Compared to Russia, the Three Seas Initiative has a smaller population between 1993 and 2021 by about 30 million, but one must remember about the much larger territory of Russia and the uneven distribution of its population. In terms of the percentage of the world, both Russia, Germany and the Three Seas Initiative are decreasing their share, which is related to the higher birth rate in other parts of the world in recent years, in Asia, Africa and South America.

Table 2. Population of the Russian Federation, Germany and the Three Seas countries in millions

Country	1993	2000	2010	2021 <sup>1</sup>
<b>Austria</b>	<b>7.906</b>	<b>8.012</b>	<b>8.363</b>	<b>9.043</b>
in % of the world	0.143	0.131	0.121	0.115
<b>Bulgaria</b>	<b>8.472</b>	<b>8.170</b>	<b>7.396</b>	<b>6.897</b>
in % of the world	0.153	0.134	0.107	0.088
<b>Croatia</b>	<b>4.600</b>	<b>4.468</b>	<b>4.295</b>	<b>4.082</b>
in % of the world	0.083	0.073	0.062	0.052
<b>The Czech Republic</b>	<b>10.330</b>	<b>10.255</b>	<b>10.474</b>	<b>10.725</b>
in % of the world	0.187	0.168	0.151	0.13
<b>Estonia</b>	<b>1.494</b>	<b>1.397</b>	<b>1.331</b>	<b>1.325</b>
in % of the world	0.027	0.023	0.019	0.017
<b>Lithuania</b>	<b>3.683</b>	<b>3.500</b>	<b>3.097</b>	<b>2.690</b>
in % of the world	0.067	0.057	0.045	0.034
<b>Latvia</b>	<b>2.563</b>	<b>2.368</b>	<b>2.098</b>	<b>1.867</b>
in % of the world	0.046	0.039	0.030	0.024
<b>Poland</b>	<b>38.461</b>	<b>38.259</b>	<b>38.043</b>	<b>37.797</b>
in % of the world	0.694	0.626	0.550	0.480
<b>Romania</b>	<b>22.763</b>	<b>22.443</b>	<b>20.247</b>	<b>19.128</b>
in % of the world	0.411	0.367	0.293	0.243
<b>Slovakia</b>	<b>5.325</b>	<b>5.389</b>	<b>5.391</b>	<b>5.461</b>
in % of the world	0.096	0.088	0.078	0.069
<b>Slovenia</b>	<b>1.992</b>	<b>1.989</b>	<b>2.049</b>	<b>2.079</b>
in % of the world	0.036	0.032	0.030	0.026
<b>Hungary</b>	<b>10.358</b>	<b>10.211</b>	<b>10.000</b>	<b>9.634</b>
in % of the world	0.187	0.167	0.144	0.122
<b>Germany</b>	<b>81.156</b>	<b>82.212</b>	<b>81.777</b>	<b>83.900</b>
in % of the world	1.465	1.345	1.181	1.066
<b>Russia</b>	<b>148.459</b>	<b>146.597</b>	<b>142.849</b>	<b>145.912</b>
in % of the world	2.681	2.398	2.064	1.853
<b>The 3 Seas countries together</b>	<b>117.947</b>	<b>116.461</b>	<b>112.784</b>	<b>110.728</b>
in % of the world	2.130	1.905	1.629	1.406
<b>The world</b>	<b>5.538.000</b>	<b>6.114.000</b>	<b>6.922.000</b>	<b>7.874.000</b>

Source: (own study based on data from the World Bank).

<sup>1</sup> Source: 2021 population ([www.populationreview.com/countries](http://www.populationreview.com/countries)).

Table 3 presents the spatial potential expressed by the size of the territory.

Table 3. Area of countries in thous. km<sup>2</sup>

<b>Country</b>	<b>Area</b>
<b>Austria</b>	<b>83.871</b>
in % of the world	0.062
<b>Bulgaria</b>	<b>110.879</b>
in % of the world	0.082
<b>Croatia</b>	<b>56.594</b>
in % of the world	0.042
<b>The Czech Republic</b>	<b>7.865</b>
in % of the world	0.059
<b>Estonia</b>	<b>45.227</b>
in % of the world	0.034
<b>Lithuania</b>	<b>65.300</b>
in % of the world	0.048
<b>Latvia</b>	<b>64.559</b>
in % of the world	0.048
<b>Poland</b>	<b>312.679</b>
in % of the world	0.232
<b>Romania</b>	<b>238.391</b>
in % of the world	0.177
<b>Slovakia</b>	<b>49.037</b>
in % of the world	0.036
<b>Slovenia</b>	<b>20.273</b>
in % of the world	0.015
<b>Hungary</b>	<b>93.028</b>
in % of the world	0.069
<b>Germany</b>	<b>357.114</b>
in % of the world	0.265
<b>Russia</b>	<b>17.098.242</b>
in % of the world	12.690
<b>The 3 Seas countries together</b>	<b>1.218.703</b>
in % of the world	0,904
<b>The world</b>	<b>134.740.000</b>

Source: (own study based on data from the World Bank and <https://welearn.pl/najwieksze-panstwa-swiata-lista/>).

The Three Seas Initiative countries are small and medium-sized European countries. None of them is individually larger than Germany, while as a whole the Three Seas countries occupy 1 million 218 thousand km<sup>2</sup>, which is 3.4 times more than Germany. Russia is currently the largest country in the world. Compared to previous centuries, the territory of states is no longer such a big factor of power. Globally, the Three Seas Initiative covers less than 1% of the land area, Germany 0.3% and Russia 12.7%.

Table 4 contains data on military spending in billions of US dollars at current prices.

Table 4. Military expenditures of the Russian Federation, Germany and the Three Seas countries in billions of US dollars

Country	1993	2000	2010	2021
<b>Austria</b>	<b>2.115</b>	<b>1.926</b>	<b>3.218</b>	<b>3.680</b>
in % of the world	0.303	0.259	0.195	0.192
<b>Bulgaria</b>	<b>282</b>	<b>351</b>	<b>832</b>	<b>1.280</b>
in % of the world	0.040	0.047	0.050	0.067
<b>Croatia</b>	<b>1.169</b>	<b>659</b>	<b>1.016</b>	<b>1.070</b>
in % of the world	0.167	0.089	0.062	0.056
<b>The Czech Republic</b>	<b>815</b>	<b>1.157</b>	<b>2.498</b>	<b>3.970</b>
in % of the world	0.117	0.156	0.152	0.207
<b>Estonia</b>	<b>13</b>	<b>78</b>	<b>332</b>	<b>786</b>
in % of the world	0.002	0.011	0.020	0.041
<b>Lithuania</b>	<b>20</b>	<b>140</b>	<b>326</b>	<b>1.250</b>
in % of the world	0.003	0.019	0.020	0.065
<b>Latvia</b>	<b>17</b>	<b>70</b>	<b>260</b>	<b>835</b>
in % of the world	0.002	0.009	0.016	0.043
<b>Poland</b>	<b>2.123</b>	<b>3.146</b>	<b>8.790</b>	<b>13.400</b>
in % of the world	0.304	0.424	0.534	0.698
<b>Romania</b>	<b>722</b>	<b>936</b>	<b>2.086</b>	<b>5.610</b>
in % of the world	0.103	0.126	0.127	0.292
<b>Slovakia</b>	<b>267</b>	<b>342</b>	<b>1.138</b>	<b>2.010</b>
in % of the world	0.038	0.046	0.069	0.105
<b>Slovenia</b>	<b>230</b>	<b>222</b>	<b>772</b>	<b>670</b>
in % of the world	0.033	0.030	0.047	0.035
<b>Hungary</b>	<b>736</b>	<b>716</b>	<b>1.351</b>	<b>2.630</b>
in % of the world	0.105	0.096	0.082	0.137
<b>Germany</b>	<b>35.031</b>	<b>26.498</b>	<b>43.026</b>	<b>56.100</b>
in % of the world	5.014	3.569	2.611	2.922
<b>Russia</b>	<b>7.767</b>	<b>9.228</b>	<b>58.720</b>	<b>62.200</b>
in % of the world	1.112	1.243	3.563	3.240
<b>The 3 Seas countries together</b>	<b>8.510</b>	<b>9.743</b>	<b>22.609</b>	<b>37.191</b>
in % of the world	1.218	1.312	1.372	1.937
<b>The world</b>	<b>698.679</b>	<b>742.433</b>	<b>1.648.000</b>	<b>1.920.000</b>

Source: (own study based on data from the World Bank and Military Balance).

The end of the Cold War and the end of the bipolar world did not stop the world arms race. Defense spending increased 2.7 times between 1993 and 2021, from \$698 billion to \$1,920 billion. In most of the countries surveyed, even the COVID-19 pandemic did not stop the increase in expenditure. Over the course of almost four decades, all countries in table 4 significantly increased their military spending, but one must also remember about

the increase in inflation during this period. Among the countries of the Three Seas Initiative, in individual decades, Poland was the leader in terms of the amount of military spending, although in 1993 it spent less than Germany 16.5 times, in 2000 – 8.4 times, in 2010 – 4.9 times, and in 2021 r. 4.2 times. This example shows a downward trend in this area and a decrease in Germany's advantage in defense spending. It is worth noting that Poland doubled and Romania and Russia tripled their world share measured in percentage terms. In the analyzed period, Russia systematically increased its spending, starting from 1993. However, the jump in this respect took place after Putin and Medvedev took power in Russia. Between 1993 and 2021, Russia increased its defense spending eight times. 2010 also saw the peak of Russia's percentage share in the world - 3.6%. However, the pandemic and the deepening crisis in the Russian economy interrupted this increase, in 2021 it decreased to 3.2% of the world share in defense spending. Despite the absolute increases, Germany's expenditure in this area is falling in terms of global shares from 5% in 1993 to 2.9% in 2021. The Three Seas Initiative countries also made up for the differences with the main powers of the region in this period. In 1993, they jointly spent nominally \$8.5 billion on the army, and in 2021, \$37 billion. The position of the Three Seas Initiative in the percentage share of the world is also gradually growing from 1.2% to almost 2% in 2021.

Table 5 contains data on soldiers in active service of the surveyed countries.

Table 5. Number of soldiers in active service of the Russian Federation, Germany and the Three Seas Initiative countries in thousands

Country	1993	2000	2010	2021
<b>Austria</b>	<b>45</b>	<b>41</b>	<b>27</b>	<b>23.300</b>
in % of the world	0.190	0.184	0.130	0.117
<b>Bulgaria</b>	<b>52</b>	<b>80</b>	<b>35</b>	<b>37</b>
in % of the world	0.219	0.360	0.169	0.186
<b>Croatia</b>	<b>80</b>	<b>61</b>	<b>19</b>	<b>16.700</b>
in % of the world	0.337	0.274	0.092	0.084
<b>The Czech Republic</b>	<b>107</b>	<b>58</b>	<b>18</b>	<b>26.600</b>
in % of the world	0.451	0.261	0.087	0.134
<b>Estonia</b>	<b>5</b>	<b>5</b>	<b>5</b>	<b>7.200</b>
in % of the world	0.021	0.022	0.024	0.036
<b>Lithuania</b>	<b>10</b>	<b>13</b>	<b>9</b>	<b>23</b>
in % of the world	0.042	0.058	0.043	0.116
<b>Latvia</b>	<b>5</b>	<b>5</b>	<b>6</b>	<b>8.750</b>
in % of the world	0.021	0.022	0.029	0.044
<b>Poland</b>	<b>260</b>	<b>319</b>	<b>100</b>	<b>114.050</b>
in % of the world	1.095	1.435	0.482	0.575
<b>Romania</b>	<b>200</b>	<b>207</b>	<b>73</b>	<b>71.500</b>
in % of the world	0.842	0.931	0.352	0.360
<b>Slovakia</b>	<b>33</b>	<b>39</b>	<b>17</b>	<b>18</b>
in % of the world	0.139	0.175	0.082	0.091
<b>Slovenia</b>	<b>12</b>	<b>9</b>	<b>7</b>	<b>7</b>
in % of the world	0.051	0.040	0.034	0.035

Table 5 (cont.). Number of soldiers in active service of the Russian Federation, Germany and the Three Seas Initiative countries in thousands

Country	1993	2000	2010	2021
<b>Hungary</b>	<b>65</b>	<b>44</b>	<b>29</b>	<b>34.200</b>
in % of the world	0.273	0.198	0.140	0.172
<b>Germany</b>	<b>398</b>	<b>221</b>	<b>251</b>	<b>183.400</b>
in % of the world	1.676	0.994	1.211	0.924
<b>Russia</b>	<b>1500</b>	<b>1520</b>	<b>1027</b>	<b>900</b>
in % of the world	6.318	6.835	4.953	4.536
<b>The 3 Seas countries together</b>	<b>874</b>	<b>881</b>	<b>345</b>	<b>387.3</b>
in % of the world	3.681	3.962	1.664	1.952
<b>The world</b>	<b>23741</b>	<b>22237</b>	<b>20734</b>	<b>19843</b>

Source: (own study based on data from Military Balance).

Among all the countries included in the list, there is a visible downward trend in terms of the number of soldiers in active service. After the Cold War period, countries maintained significant armies – Russia 1.5 million, Germany 398,000, the Three Seas countries 874,000. On a global scale, in 1993, the armies of the countries listed in the table accounted for 11.7% of all the armed forces of the globe. In 2021, it was already 7.5% of all soldiers worldwide. Germany reduced the number of its army in the period under review by almost 215,000, Russia by 600,000, and the Three Seas Initiative by 487,000. In 2021, the Three Seas countries overtook the German army in terms of the number of soldiers by almost 204,000, while Russia had a more than two-fold advantage over the Three Seas in terms of the number of soldiers in active service in 2021 – 900,000.

To determine the international balance of power, it is of great importance to estimate power indicators in three types: general, military and geopolitical (Tables 6–8).

Table 6 presents the economic (general) power of the surveyed countries in the years 1993–2021.

Table 6. Economic power (general) of the Russian Federation, Germany and the Three Seas Initiative countries in mm, i.e. the world = 1000

Country	1993	2000	2010	2021
<b>Austria</b>	4.394	3.696	3.662	3.282
<b>Bulgaria</b>	0.709	0.659	0.969	0.973
<b>Croatia</b>	0.647	0.744	0.897	0.706
<b>The Czech Republic</b>	3.152	2.900	2.240	2.360
<b>Estonia</b>	0.137	0.235	0.325	0.373
<b>Lithuania</b>	0.437	0.472	0.618	0.650
<b>Latvia</b>	0.210	0.341	0.426	0.427
<b>Poland</b>	4.576	5.490	6.700	6.320
<b>Romania</b>	1.707	1.750	2.843	3.092
<b>Slovakia</b>	0.773	0.921	1.209	1.102
<b>Slovenia</b>	0.569	0.532	0.589	0.531

Table 6 (cont.). Economic power (general) of the Russian Federation, Germany and the Three Seas Initiative countries in mm, i.e. the world = 1000

Country	1993	2000	2010	2021
Hungary	1.707	1.554	1.896	1.779
Germany	40.431	31.926	28.748	25.717
Russia	25.407	14.858	29.351	23.906
The 3 Seas countries together	20.547	20.0310	22.216	21.203
The world	1000	1000	1000	1000

Source: (own study based).

The presentation of the data in table 6, calculated on the basis of Professor Sułek's model, shows that the more developed countries in the years 1993-2021 decreased their economic power – Austria, the Czech Republic, Slovenia, Russia, and in particular Germany. On the other hand, the countries starting after the Cold War with economies more burdened by the years of subordination to the USSR and in many cases energy-intensive over the nearly thirty years under study gained - Bulgaria, Croatia, Estonia, Lithuania, Latvia, Poland, Romania, Slovakia, Hungary. The growth of the power of states was uneven, sometimes sinusoidal. It is worth noting that higher values occur in 2010 compared to 2021. This is related to the economic effects of the pandemic, which also affected all the countries surveyed. Only some countries improved their power values between this period, but by insignificant values. The largest countries, Russia, Germany and Poland, lowered their total power values. In the analyzed period, Germany recorded the largest decline in power, by as much as 36%, recording a decrease in each range. Russia reached the peak of its economic power in 2010, surpassing even Germany, but later a decline related to the wars, pandemic and sanctions was visible. Although the power of Russia and Germany is declining and subject to various fluctuations, the Three Seas countries nominally between 1993 and 2021 improved their power performance, which was growing. While in 1993 these differences were more visible, already in 2021 the overall power of Germany, Russia and the Three Seas Initiative does not differ much from each other, and the distance will probably decrease especially in relation to Russia in the following years. The balance of power in Central and Eastern Europe in 1993 in terms of overall power was characterized by a strong position of Germany and a similar position of Russia and the Three Seas countries. Over the last 30 years, the system has changed: the position of Germany and Russia has decreased, and the Three Seas countries have strengthened their position.

Table 7 presents calculations of the military power of the surveyed countries.

Table 7. Military power of the Russian Federation, Germany and the Three Seas Initiative countries in mm, i.e. the world = 1000

Country	1993	2000	2010	2021
Austria	2.615	2.350	1.811	1.750
Bulgaria	0.748	0.923	0.818	1.002
Croatia	1.928	1.220	0.758	0.697
The Czech Republic	1.683	1.806	1.397	1.879
Estonia	0.054	0.172	0.267	0.463

Table 7 (cont.). Military power of the Russian Federation, Germany and the Three Seas Initiative countries in mm, i.e. the world = 1000

Country	1993	2000	2010	2021
Lithuania	0.088	0.323	0.312	0.840
Latvia	0.068	0.167	0.246	0.523
Poland	4.427	5.831	5.348	6.619
Romania	2.010	2.338	1.898	3.292
Slovakia	0.598	0.711	0.784	1.052
Slovenia	0.396	0.354	0.456	0.380
Hungary	1.439	1.266	1.056	1.545
Germany	30.644	21.919	18.659	18.938
Russia	23.334	25.527	47.300	43.612
<b>The 3 Seas countries together</b>	16.516	17.618	15.023	19.475
<b>The world</b>	<b>1000</b>	<b>1000</b>	<b>1000</b>	<b>1000</b>

Source: (own study).

Calculations of military power according to the Sułek model indicate that the largest military power in all the years indicated, except for 1993, was Russia, which reached its peak in 2010 – 4.7% of the world share. Germany's position in this respect shows a downward trend, as does Russia's between 2010 and 2021. On the other hand, the power of the Three Seas countries is increasing, except for 2010, when there was a slight decrease compared to previous years. In 2021, the Three Seas Initiative overtook Germany in terms of military power for the first time, while Russia this year had a two-fold advantage in this respect over the Three Seas Initiative and over Germany. Among the countries of the Three Seas Initiative, Poland has the greatest military power, it also recorded an increase of as much as 49% in the analyzed period. In terms of the balance of power based on military power, we are dealing with a two-fold advantage of Russia, and therefore one can say that a unipolar system has developed in the region of Central and Eastern Europe.

Table 8 presents the third type of power according to Professor Sułek's model, namely the geopolitical power.

Table 8. Geopolitical power of the Russian Federation, Germany and the Three Seas countries in mm, i.e. the world = 1000

Country	1993	2000	2010	2021
Austria	3.208	2.799	2.428	2.260
Bulgaria	0.735	0.835	0.868	0.992
Croatia	1.501	1.061	0.804	0.700
<b>The Czech Republic</b>	2.172	2.170	1.678	2.039
Estonia	0.082	0.193	0.286	0.433
Lithuania	0.204	0.373	0.414	0.776
Latvia	0.115	0.225	0.306	0.491
Poland	4.477	5.717	5.798	6.520
Romania	1.909	2.142	2.213	3.225



Table 8 (cont.). Geopolitical power of the Russian Federation, Germany and the Three Seas countries in mm, i.e. the world = 1000

Country	1993	2000	2010	2021
<b>Slovakia</b>	0.656	0.781	0.926	1.069
<b>Slovenia</b>	0.454	0.413	0.501	0.430
<b>Hungary</b>	1.529	1.362	1.336	1.623
<b>Germany</b>	33.906	25.255	22.022	21.198
<b>Russia</b>	24.025	21.971	41.317	37.043
<b>The 3 Seas countries together</b>	17.860	18.422	17.421	20.051
<b>The world</b>	<b>1000</b>	<b>1000</b>	<b>1000</b>	<b>1000</b>

Source: (own study).

This type of power is built on general and military components. Therefore, the military one has been included as a double product in the presented model. Most countries improved their position in the world share, although only Russia and Poland significantly. In the rest of the countries, the increase was insignificant. The Three Seas Initiative also improved its global share in this respect by 12% between 1993 and 2021. In the same years, a significant decrease in the geopolitical importance of Germany is visible, from 33.9 mm to 21.2 mm, i.e. by as much as 37%. The balance of power in terms of geopolitical power is characterized by the predominance of Russia in this part of Europe, but with the equal power of Germany and the Three Seas countries. Individual countries that are part of the Three Seas Initiative do not play a major role in terms of geopolitical power in relation to Germany and Russia.

## 5. CONCLUSIONS

The aim of the paper was to present the powermetric position of Germany and Russia against the background of individual countries forming the Three Seas Initiative, as well as nominally the entire Initiative. The calculations were based on the model of Professor Mirosław Sułek, who used synthetic power measures. The indicated model takes into account the values of GDP, population, territory, military expenditure and the number of soldiers in active service.

In terms of GDP, the Three Seas countries strengthened their position both in terms of quantity and percentage of the world. The end of the Cold War and the regaining of full independence by the countries of Central and Eastern Europe resulted in reforms that led to the strengthening of the position of the countries of this part of Europe. The Three Seas Initiative as a whole maintained a global share of 2% in terms of GDP. There is a noticeable decrease in the percentage of Germany in world shares by almost half. After falling at the turn of the century to 0.77% in terms of its position in the global economy, Russia reached a peak of over 2% in 2010, and has recorded a decline in recent years. In 2021, the GDP of Germany was USD 4 trillion 230 billion, Russia USD 1 trillion 647 billion, and the Three Seas countries USD 2 trillion 336 billion.

The demographics of most of the surveyed countries in the period 1993-2021 indicate absolute and percentage decreases in their global share. Population declines are particularly noticeable in Russia and the Three Seas Initiative as a whole, although many countries

forming this initiative are depopulating to varying degrees. Also Germany, despite accepting immigrants, is decreasing its global share expressed as a percentage.

The Three Seas Initiative countries are small and medium-sized European countries, individually each of them is smaller than Germany, but as a whole they create great geopolitically and economically opportunities in this part of Europe.

In the years 1993–2021, the economic power of the surveyed entities underwent changes, which also had an impact on the existing balance of power in this region. The overall power of Germany at that time fell from 40 mM to 26 mM, similarly Russia decreased its global share despite the increase in its position, for example, in 2010 from 25 mM to 24 mM. Against this background, the Three Seas Initiative maintained similar global power values of 20–22 mM throughout the entire period. Approaching in 2021 both to Russia and Germany in this respect. The resulting balance of power is characterized by instability and striving to increase its own position among Germany, Russia and the Three Seas Initiative, which has a chance to play an increasingly important role in Europe, but not only in economic terms.

In terms of military power, there is a significant decrease in Germany's military power, almost halving between 1993 and 2021 from 31mM to 19mM. Russia, on the other hand, strengthened its military position during the rule of Vladimir Putin, especially since 2010, almost doubling its percentage share globally. The Three Seas Initiative maintains its position in the world, which increased from 17 mM to 19 mM, i.e. in 2021 it oscillated around 2% of the world's military power. In terms of military power, the balance of power can be described as unipolar with a large predominance of Russia.

The balance of power in terms of geopolitical power is characterized by the predominance of Russia in this part of Europe, but with the equal power of Germany and the Three Seas countries. This should be considered a great success of the Three Seas Initiative countries, whose economic transformations and military reforms allowed them to raise their position, also in terms of geopolitical power.

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## **IS THE DIGITAL REVOLUTION CONDUCTIVE TO NEET ACTIVATION? OPINIONS OF PEOPLE INVOLVED IN NEET ACTIVATION**

This article refers to the results of research that was conducted on the eve of the COVID-19 pandemic in Poland, shortly before the first confirmed laboratory case was registered. The research was carried out with 240 people who dealt daily with youth, including NEETs activation, through work or volunteering in various types of institutions (public, NGO, and private). The results allowed us to back up the hypothesis that people who deal with NEET youth support on a daily basis value traditional methods of professional activation more than digital methods. The analysis also answered the question of which demo-social variables among the respondents had an impact on their assessment of the methods used for professional activation. The variables that were found to significantly differentiate the respondents' assessments included gender, education, place of residence, the type of institution in which the respondents worked, and the age range of the respondents.

**Keywords:** PES, unemployed youth, labor market, NEET, neoliberalism.

### **1. INTRODUCTION**

In the second decade of the 21st century, in connection with the technological revolution (Industry 4.0), practically every sphere of importance for human functioning undergoes changes: the economy (economic sphere), interpersonal relations (social sphere), attitudes towards work (and work itself) change, and education changes. Both training methods and counseling methods used to activate economically inactive people (whose profile is also changing fundamentally – towards “NEET” (Not in Employment, Education, or Training)) are changing. The change taking place in this field is very rapid, and therefore the literature and research do not sufficiently describe these issues.

The main focus of this article is on inactive professional youth, included in the so-called “NEET category”.

The hypothesis in this article was the assumption that people in Poland that are involved on a daily basis in institutional support for unemployed youth, including NEETs, value traditional methods of professional activation of this social category more than digital

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methods. In the article, apart from verifying this hypothesis, we try to answer the question: whether and what demo-social variables of the respondents have an impact on their assessment?

The hypothesis was tested by quantifying the survey conducted in Poland on a sample of 240 people who daily deal with youth, including NEETs, activation through work or volunteering in various types of institutions (public, NGO and private). The distribution of responses was checked and the relationships between the evaluations of individual methods and the demo-social characteristics of the respondents were assessed using statistical methods.

## 2. LITERATURE REVIEW ON NEET. NEET SITUATION IN POLAND

The constant focus of researchers, as well as policymakers, on the so called “NEET” group, mainly among young people in particular countries around the world, as well as in the European Union (EU), is noticeable, especially from 2010 onwards. The EU policymakers even sometimes referred to having a “NEET crisis” (Mascherini, 2012). In 2012, the European Foundation for the Improvement of Living and Working Conditions (Eurofund) recommended to focus on young disadvantaged people, mainly the NEET youth, in the age range of 15 to 29 that are excluded from labor and from the education market in the EU (Mascherini, 2012; Liszka, Walawender, 2018). The NEET rate is considered the share of individuals who are not engaged in employment, education or training in the total population of young people in a given territorial area collectively (Mirończuk, 2014). If we consider the age group of 15–29 within the 27 EU member states, we may notice that in most (including Poland) the NEET youth population is feminized, with only a few EU states having more men than woman in the category (Luxembourg, Finland, Ireland, Belgium, and Estonia) (see Chart 1).

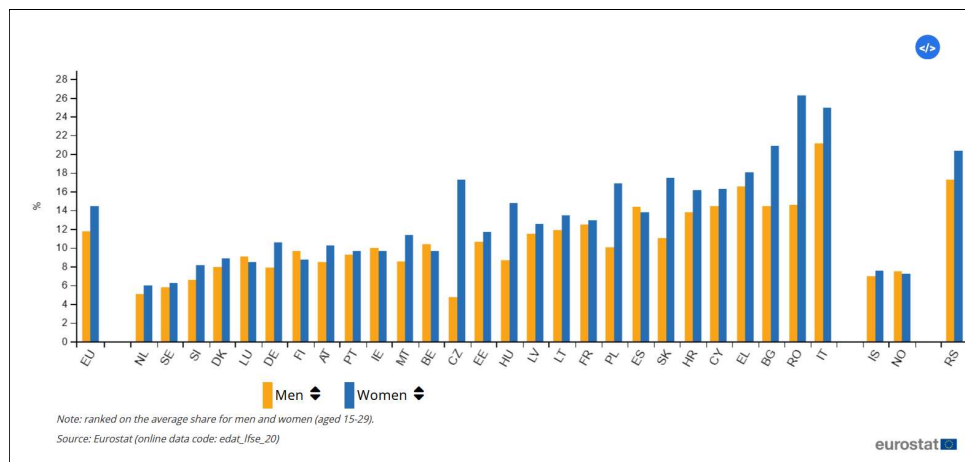


Chart 1. Young people (15–29) neither in employment nor in education and training, by sex, 2021

Source: Eurostat.

If we compare the overall share of NEETs in particular countries between 2011 and 2021, it is noticeable that the NEET rates were reduced in most EU states, but increased in Italy, Romania, Cyprus, Austria, and Luxembourg. For Poland, the rate was 15.2% in 2011, and 13.4% in 2021 (Chart 2).

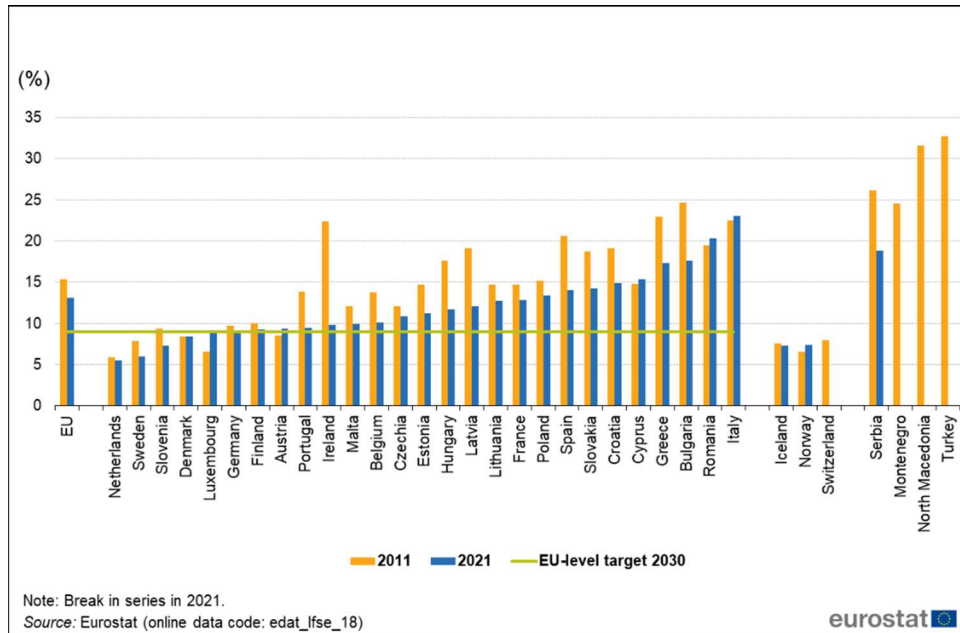


Chart 2. Young people (15–29) neither in employment nor in education and training, 2011 and 2021

Source: Eurostat.

The NEET acronym was applied by the EU as well as its member states' institutions and governments in order to build public policies, especially in the 2014–2020 EU perspective. In recent years, studies not only focus on unemployed youth, including NEET persons from a particular geographic area, but also on the macrolevel factors of nations, such as the economic growth, the educational system and the overall condition of the labor market institutions supporting the group of young people (Bacher et al., 2017). Particular focus, despite the employment policies, is on the area of the vocational education and the positive effect of the dual apprenticeship systems on employment ability of youth (Bacher et al., 2017; Liszka, Walawender, 2021). Some other studies focus on institutions and their staff. They include the perception of usefulness, trust and the effectiveness of the institutions that implement public policies on NEETs (Alonso et al., 2022), or on how the rates of different NEET subgroups are conditioned by various institutional configurations in EU states (Assmann, Broschinski, 2021). Assmann & Broschinski (2021) conducted a comparative analysis for 26 European countries using aggregated EU Labor Force Survey data from 2018 and concluded that “institutional causes of being NEET are as diverse as the group itself” (Assmann, Broschinski, 2021). The study found that in Northern European

countries with high expenditures on disability benefits there are also high rates of NEETs with a disability or illness concluding that high disability benefits may create false incentives to stay away from the labor market. High levels of NEETs with care responsibilities were noticed in Visegrad group countries (Czechia, Slovakia, Hungary, and Poland) with undeveloped family-related services in conjunction with weak formalized long-term care. Greece, Italy, Spain, France, Croatia, Latvia, and Portugal having very restrictive employment protection legislation, have a very high proportion of unemployment youth and highest NEET rates. On the other hand, Germany, Austria, Belgium, the UK, and Ireland, Lithuania, and Slovenia have less restrictive employment protection integration and developed work-oriented VET systems or have high investment in education, and are characterized by particularly low rates of discouraged and unemployed NEETs (Assmann, Broschinski, 2021).

Public, non-public (Civil Society Organizations), and privately owned institutions supporting young people outside the education and labor market play a crucial role in the implementation of particular public policies in EU states, including the “flagship” initiative – Youth Guarantee (YG) created in order to support unemployed young people. In 2013, the idea of the proposed instrument was to provide each young person an offer of employment, further education, apprenticeship, or traineeship in as little as four months after the person becomes unemployed, or leaves the formal education system (Council of the European Union, 2013). Particularly, the public employment services (PESs) have a crucial role in the implementation of YG in EU countries. An interesting research on PESs located in European countries and their role as the lead organizations in the implementation and coordination of YG shows that in only seven EU countries the national PESs are clearly identified as the lead organizations for coordinating and managing the YG schemes, and only in two (Poland and Cyprus) they have the most responsibilities in implementation (Tosun, 2017). A study on data gathered from survey studies in which all but the Spanish PESs participated assigned one point per each of the following dimension concerning national PESs and their role in the YG initiative: responsibility for management and co-ordination of the YG (1 point), coordinating the public and private organizations involved in the YG implementation (1 point), outreach of NEETs (1 point), registering young unemployed people (1 point), provision of YG services (1 point), following up who benefitted (1 point) (Tosun, 2017). The Polish and the Cyprus PESs were assigned 6 points, which meant having the most responsibilities pertaining to YG implementation and support of unemployed youth, including NEETs. Therefore, the next question is how the PESs in Poland try to recruit NEETs and if they succeed or not, especially since 87% of YG participants enter the program through PESs in Poland and two thirds of YG project coordinators reported problems with recruitment of participants (Hardy et al., 2018). A study by Smoter (2022) concluded that most of NEETs in the age group of 15–24 remain beyond the reach of the public services registers, including as much as three quarters of NEETs from the Polish rural areas. Moreover, the results show that most PESs did not cooperate with local institutions, rarely used modern channels of communication with potential clients and if so, only with a limited extent used such methods as mobile units, info-kiosks, or information centers for targeting the hardest-to-reach NEETs. Only some of them also used promotion on social media (39.5%) (Smoter, 2022). Even worse young NEET coverage by YG was observed in Spain (31.7% of the possible beneficiaries) (Strecker et al., 2021), or in Hungary, where research shows that only 6.2% of the NEET population was covered by the program, mainly due to problems with reaching unregistered



NEETs, and lack of cooperation and communication between institutions (Parrag, 2019). Problems with reaching inactive NEETs who are not registered at PESs are noticed all over the world, also outside the EU states (OECD, 2016).

### **3. CHANGES IN TRAINING AND CONSULTING METHODS TOWARDS DIGITIZATION**

Nowadays, labor market sets new challenges for young people, as beside theoretical knowledge and practical skills, digital skills and competences pertaining to the use of digital technology have a great importance. Poor digital skills can result in social exclusion, while strong digital competences may guarantee good earnings and safety of employment (Madej-Kurzawa et al., 2021). This applies as well to young people in the NEET status. A number of initiatives targeting unemployed youth try to equip the participants with digital employability skills, such as searching jobs on-line, ability to write a CV with word editing software, and filling a job application through a computer (Szpakowicz, 2022). The Madej-Kurzawa et al. (2021) study allowed for the identification of four groups of EU countries differing by NEET rates and digital skills. The research team concluded, that countries with lowest NEET rates are also those where young people present high levels of digital skills and countries with highest NEET rates include those where young people present low levels of digital skills. Poland was among the countries with medium NEET rates and those where youth presents strong digital competences, but only in processing e-mails, and low digital competences in searching for job, study, and course offers online and applying for them (Madej-Kurzawa et al., 2021). The staff of the organizations that work with disadvantaged youth should play a crucial role in encouraging young people to acquire or develop digital skills. One study concluded that in Poland 42.5% of NEET respondents find their level of qualification and professional competencies satisfactory (Rak, 2022).

Digital transformations also affected institutions supporting unemployed youth, including services of “employment assistance”, as the major forms of interventions they offer include career guidance, candidate profiling, and job-matching. Nonetheless, organizations may still prefer face-to-face communication over the digital one during technological reforms (Scarano, Colfer, 2022). Public services (PESs) can also benefit from digitalization, for example by allowing first time service-users to register their profiles in the PES system, or by posting videos, tests, or reading instructions for jobseekers on the PES website, external sites, or self-service portals. They may also use more advanced methods for organization of online trainings with trainers, live webinars, remote meetings, recordings, etc. (Scarano, Colfer, 2022). Digital transformation is also noticeable in career guidance for labor market integration (Kraatz, 2021). Digitalization can also be used to change the necessity of personal meetings of the client with the professional to remote meetings via diverse channels and with usage of online tools in order to increase the accessibility of services (Scarano, Colfer, 2022). Nonetheless, technology cannot replace human interactions, as they are crucial even when using the digital channels (email, counseling using online video channels, chats), so it seems “traditional channels” of communication are not disappearing. Still, digitalization may be a challenge for clients living in rural areas, people with lower education and digital skill levels, and some groups of migrants (Kraatz, 2021). Moreover, an international study concluded that some traditional communication channels, such as telephone communication, can better reach vulnerable clients across country (Kraatz, 2018).

From a more philosophical approach, digital technologies may paradoxically create a potential for an ethical renewal of learning in line with the neoliberal principle of freedom emerging from the individual possibilities it opens, freedom of production, and the search for a new mechanism of security - especially through the Blended Learning (BL) scheme, where learning can be done in part by online delivery and in part by stationary or “traditional” delivery by the trainer (Grimaldi, Ball, 2019). In this approach, BL promises more educational freedom, more effective timing and arrangement of the learning process for the student, more equity, and reduced timing for direct activities with the trainer, and in conclusion greater effect on the education process (Grimaldi, Ball, 2019). The BL scheme may also create a solution that meets expectations of both, the supporters of “traditional channels”, as well as the enthusiasts of digitalization in the area of supporting the clients, including NEETs.

Our research may be treated as a pilot study filling the gap in the area of studying the opinions of institutional staff from all over the Poland on the value and effectiveness of traditional tools versus the digital ones in the areas of labor market, job related courses, career guidance, and “employment assistance” services offered for unemployed youth, including NEETs, that the respondents' institutions support. Before we move to the research results, it is worth mentioning the research was done on the eve of the COVID-19 pandemic in Poland, as we were finishing gathering the data at the end of 2019 and at the beginning of 2020, a few weeks later, on 4th March 2020, the first laboratory confirmed case was registered in Poland. The so called “the China virus” by some Polish media (Wapteka, 2020), although known at the time, seemed a still a distant treat for Poles.

## **4. RESULTS**

### **4.1. Characteristics of the surveyed group of respondents**

When selecting the sample, the spatial criterion (division into 16 voivodships) was taken into account. The respondents represented a total of 75 institutions. Only respondents who had contact young people from the 15–29 age range at work, place of employment, or through voluntary activity with were eligible. The research was carried out using a paper questionnaire. Most of the questionnaire included close ended questions. It also included selected scales of attitudes.

241 respondents took part in the study, but one questionnaire was rejected, so 240 were included for the data analyses. The respondents constituted a highly feminized and very well educated group: three quarters of the respondents were women and 90% had higher education. The average age of the respondents was 40 years, the median was 38. The greatest number of respondents was between 36 and 45 years old (37%). Every fifth respondent lived in a rural area. The largest percentage were residents of cities with a population of over 100,000 residents. Every fifth respondent had a disability certificate (Table 1).

When considering the structure of the respondents in terms of the characteristics of the people they work with, it should be noted that the largest number of respondents (every third) worked for non-governmental organizations (foundations, associations) and for public employment services (nearly every fifth).

In their professional practice, the results indicated that most often the respondents work with people from “all age groups indicated in the survey” (33%) and with people older than 29 (32%).

Table 1. The characteristics of the studied group in terms of domestic characteristics

		No.	Percentage
Sex	Women	183	76%
	Men	57	24%
Age	Less than 25 years	10	4%
	25–35 years	77	32%
	36–46 years old	88	37%
	46–55 years old	44	18%
	56–65 years old	19	8%
	More than 65 years old	3	1%
Education	Secondary general education	12	5%
	Post-secondary and sec. vocational	13	5%
	Bachelor's degree	16	7%
	Master's degree	197	82%
	Doctoral degree	3	1%
Domicile	village	48	20%
	city up to 20,000 residents	27	11%
	city with 20 to 50 thousand	42	18%
	city with 50 to 100 thousand	32	13%
	city more than 100 thousand	91	38%
Certificate of disability	yes	20	8%
	no	218	92%

Source: Own study based on research results.

Almost half of the surveyed people have contact with all categories classified as “young people” in their professional work. Every fifth respondent indicated that they work with the category of people defined as people who have not been studying or working for at least 4 weeks before the meeting (Table 2).

Table 2. Characteristics of the studied group according to the nature of the people with whom the respondents work

		No.	Percentage
Institution type	public employment services (regional, poviat)	40	17%
	Volunteer Labor Corps	34	14%
	non-governmental organization (foundation, association)	75	32%
	school (vocational education – trade schools/ technology)	16	7%
	school (other than those mentioned above)	13	6%
	non-school training institution	32	13%
	institution of employment agency or career counseling	20	8%
	other	8	3%
Age range of young people with whom the respondent has contact	from 15 to 18 years	31	13%
	from 18 to 25 years	38	16%
	from 25 to 29 years	12	5%
	all of the above	79	33%
	different age range	76	32%

Table 2 (cont.). Characteristics of the studied group according to the nature of the people with whom the respondents work

		No.	Percentage
Young people with whom most often the respondent has contact	learners and working people	27	11%
	learners, but not working for at least 4 weeks before the meeting	26	11%
	people who have not been studying or working for at least 4 weeks before the meeting	52	22%
	all of the above	107	45%
	other	24	10%

Source: Own study based on research results.

#### 4.2. Respondents' opinion on the effectiveness of traditional forms of professional and educational activation among people aged 15–29.

The traditional forms of professional activation usually include:

- internships/apprenticeships,
- training/vocational courses,
- social training (so-called “soft”),
- career counseling,
- job placement offered,
- referral to undertake/supplement education,
- in vocational education/training institutions.

The respondents were asked to evaluate individual forms of activation on a five-point scale, where 1 means very low effectiveness, 3 – average and 5 – very high effectiveness. Then the average of the grades was calculated. The highest average was achieved by internships/apprenticeships (4.17), followed by career counseling (4.08) and vocational training/courses (4.07). The lowest average grade was obtained by employment services (3.95) and social training (the so-called “soft”) (3.96) (Table 3).

Table 3. Basic descriptive statistics for the assessment of traditional forms of professional activation

	Mean	Me	Mo	N <sub>Mo</sub>	Min	Max	Std	V <sub>z</sub>
internships/apprenticeships	4.17	4	5	100	1	5	0.88	21
training/vocational courses	4.07	4	4	95	2	5	0.87	21
social training (so-called “soft”)	3.96	4	4	97	1	5	0.88	22
career counseling/counseling	4.08	4	4	109	1	5	0.85	21
job placement offered	3.95	4	4	107	1	5	0.92	23
referral to undertake/supplement education in vocational education/training institutions	4.02	4	4	105	2	5	0.80	20

Source: Own study based on research results.

The respondents were also asked about the instruments that may be helpful in the process of preparing people aged 15 to 29 for employment. They mainly mentioned

coaching / tutoring / mentoring (72%)<sup>3</sup>, financial support during apprenticeship (71%), and to a lesser extent psychological help (55%) (Chart 3).

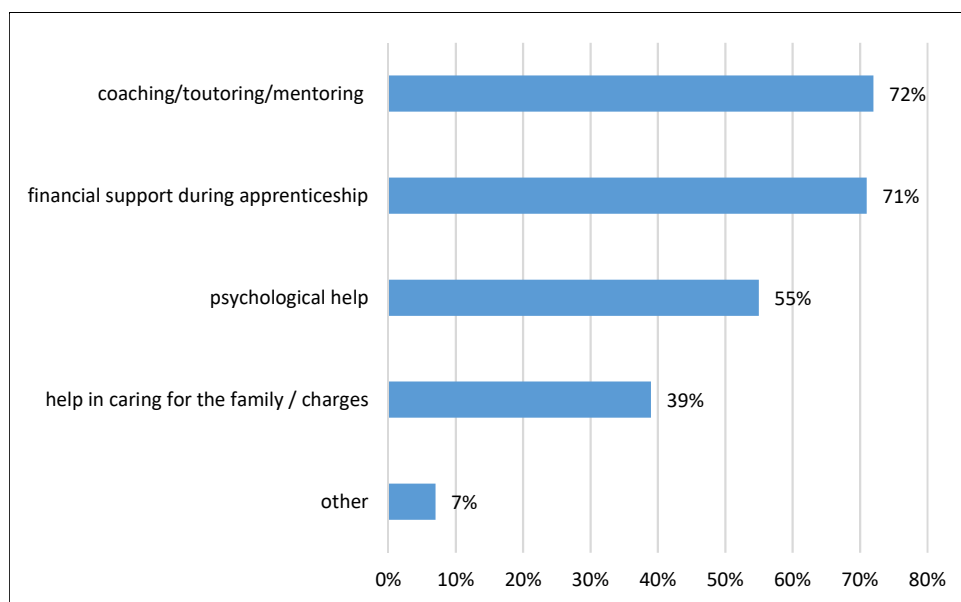


Chart 3. Instruments that may be helpful, according to the respondents, in the process of preparing people aged 15 to 29 for employment

Source: Own study based on research results.

#### 4.3. Respondents' opinion on the effectiveness of digital tools in professional and educational activation among people aged 15-29

The modern forms of vocational and educational activation in the study include:

- internet platforms / portals,
- e-learning training,
- applications / computer programs/for a smartphone,
- multimedia films (e.g. YouTube),
- gamification / workshops,
- digital diagnostic tests,
- other digital instruments in addition to those listed above.

The respondents assessed the above-mentioned forms of vocational and educational activation using a similar evaluation method as in the case of traditional methods.

The highest average scores were obtained by the following forms: platforms/internet portals and applications/computer programs/for a smartphone (4.05), followed by digital diagnostic tests (4.0). The lowest scores were given to e-learning trainings (3.72) (Table 4).

<sup>3</sup> The respondents could provide several answers.

Table 4. Basic descriptive statistics for the evaluation of the effectiveness of digital tools in professional activation

	Mean	Me	Mo	N <sub>Mo</sub>	Min	Max	Std	V <sub>z</sub>
internet platforms/portals	4.05	4	4	108	1	5	0.83	21
e-learning training	3.72	4	4	100	1	5	0.90	24
applications/computer programs/for a smartphone	4.05	4	4	109	2	5	0.81	20
multimedia films (e.g. YouTube)	3.93	4	4	94	2	5	0.86	22
gamification games/workshops	3.87	4	4	96	1	5	0.88	23
digital diagnostic tests	4.00	4	4	105	1	5	0.83	21
other digital instruments in addition to those listed above	1.30	1	1	161	1	2	0.46	35

Source: Own study based on research results.

When asked whether digital instruments, in addition to those listed above (i.e. platforms/portals, applications/programs, e-learning training, multimedia films, games, digital tests), can be helpful in the process of preparing people aged 15 to 29 years of age for employment, 70% of the respondents answered negatively and 30% positively (Chart 4).

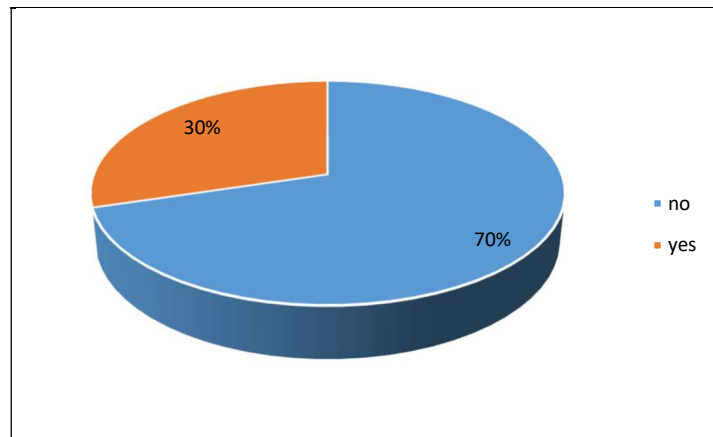


Chart 4. Can other instruments be helpful in the process of preparing for employment by people aged 15–29?

Source: Own study based on research results.

#### 4.4. The difference in ratings

When analyzing the differences in assessments, it should be stated that methods considered traditional are generally rated higher than digital tools. Figure 3 presents the average scores for traditional and digital tools in the socio-professional activation of young people. The three top-rated tools with averages between 4.17 and 4.07 are traditional tools. These are: internships/apprenticeships, counseling / career counseling and training/vo-

cational courses. The three lowest rated tools with averages between 3.93 and 3.72 are digital. These are: multimedia films (eg YouTube), games/gamification workshops and e-learning trainings (Chart 5).

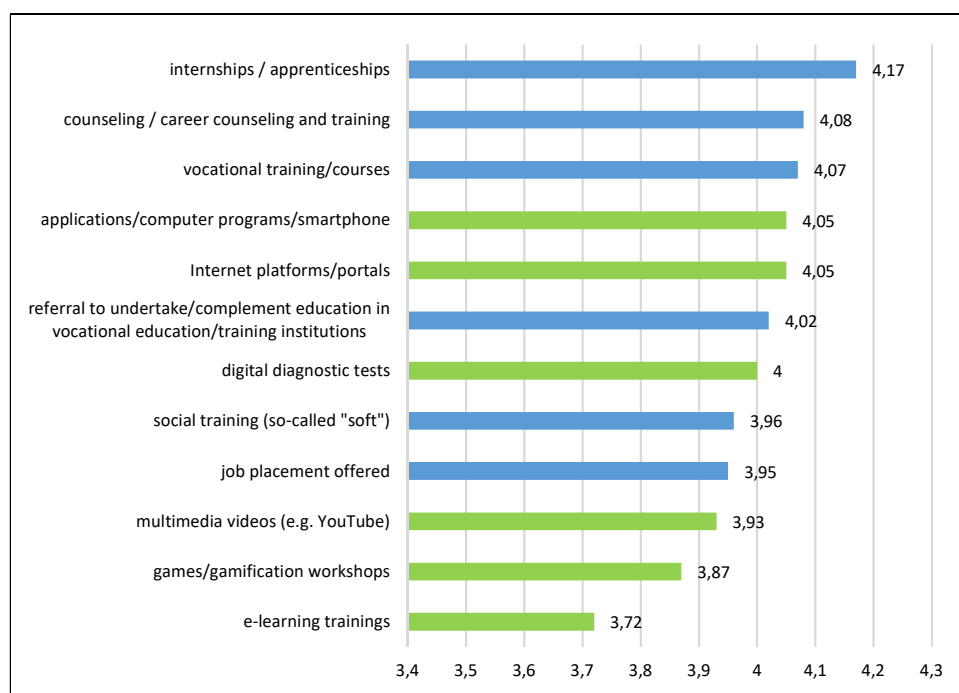


Chart 5. Average ratings of the effectiveness of digital tools in professional activation ("traditional" – blue and "digital" – green)

Source: Own study based on research results.

#### 4.5. Dependency analysis

The analysis includes the results of the ANOVA Kruskal-Wallis and U Mann-Whitney tests that allow to assess whether the relationship or differences between the selected variables are statistically significant. These are nonparametric tests. The significance level of  $\alpha = 0.05$  was adopted for the research. It is assumed that: when  $p < 0.05$  there is a statistically significant relationship (marked with \*);  $p < 0.01$ , there is a highly significant relationship (\*\*);  $p < 0.001$ , there is a very high statistically significant relationship (\*\*\*)). The analyses were completed using Statistica 13.1 and an Excel spreadsheet.

It was checked whether demo-social variables have an impact on the assessment of the use of individual activation tools. The analysis showed several such relationships.

The conducted research shows that gender is such a variable. It had an impact on the assessment of the effectiveness of social training  $p < \alpha$  ( $p = 0.0400$ ), counseling and career counseling  $p < \alpha$  ( $p = 0.0456$ ), online platforms and portals  $p < \alpha$  ( $p = 0.0155$ ), applications and computer programs  $p < \alpha$  ( $p = 0.0406$ ) and the effectiveness of games and gamification workshops  $p < \alpha$  ( $p = 0.0456$ ) (Table 5).

Table 5. U Mann-Whitney test results. Gender and traditional and digital activation tools

	<i>p</i> – (test probability)
social training (so-called “soft”)	0.0400 *
career counseling/counseling	0.0456 *
internet platforms/ portals	0.0155 *
applications / computer programs/for a smartphone	0.0406 *
gamification games/workshops	0.0456 *

Source: Own study based on research results.

Chart 6 shows how the effectiveness of all the methods mentioned above was assessed by women and men.

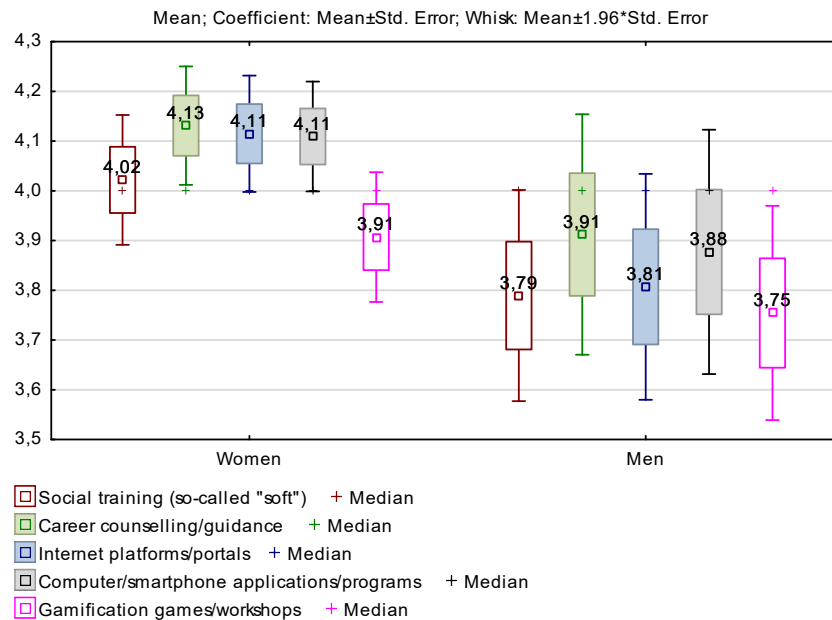


Chart 6. Average ratings of individual activation methods, broken down by gender

Source: Own study based on research results.

Another variable that significantly impacted the respondents' statements was education. The conducted research shows that education has an impact on the assessment of traditional and digital activation methods – internships and apprenticeships  $p < \alpha$  ( $p = 0.0000$ ), training and vocational courses  $p < \alpha$  ( $p = 0.0067$ ), referrals to study in vocational education institutions  $p < \alpha$  ( $p = 0.0476$ ) and in games and gamification workshops  $p < \alpha$  ( $p = 0.0462$ ) (Table 6).



Table 6. Kruskal-Wallis ANOVVA test results. Education and traditional and digital activation tools

	<i>p – (test probability)</i>
internships / apprenticeships	0.0000 ***
training / vocational courses	0.0067 **
referral to study in vocational education institutions	0.0476 *
gamification games / workshops	0.0462 *

Source: Own study based on research results.

Chart 7 shows that the effectiveness of internships and apprenticeships was rated the highest by people with general secondary education (4.33), and the lowest by people with doctoral education (2.67). Similarly, the effectiveness of training and vocational courses was rated the highest by people with general secondary education (4.25), and the lowest by people with doctoral education (3.33). The same difference is also in the assessment of the effectiveness of referral to study in vocational education institutions, which was the effectiveness of this tool was the highest rated by people with general secondary education (4.08), and the lowest by people with doctoral education (3.67). The last tool comes from the digital group and it was an assessment of the effectiveness of games and gamification workshops. The effectiveness of this tool is rated the highest by people with doctoral education (4.33) and the lowest by those with post-secondary and secondary vocational education (3.62) (Chart 7).

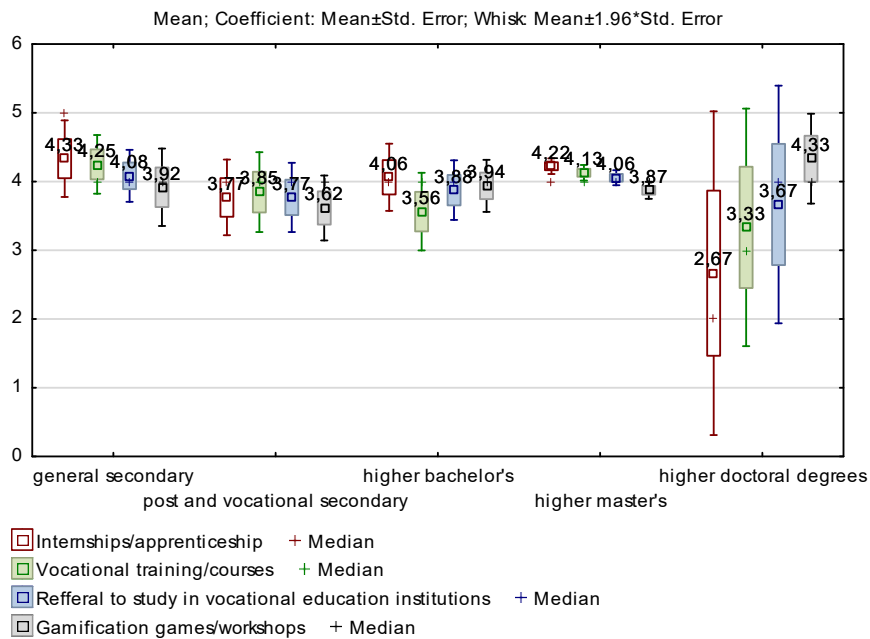


Chart 7. Average ratings of individual activation methods, broken down by education

Source: Own study based on research results.

Another variable impacting the respondents' statements was the place of residence. The research shows that this variable has an impact on the evaluation of digital activation methods – platforms and internet portals  $p < \alpha$  ( $p = 0.0471$ ) and multimedia films  $p < \alpha$  ( $p = 0.0424$ ) (Table 7).

Table 7. Kruskal-Wallis ANOVVA test results. Education and digital activation tools

	$p - (test\ probability)$
internet platforms / portals	0.0471 *
multimedia films (e.g. YouTube)	0.0424 *

Source: Own study based on research results.

Chart 8 shows that the highest effectiveness of internet platforms and portals is assessed by people living in cities with over 50,000 up to 100,000 inhabitants (4.31) and the lowest living in the largest cities (3.85).

On the other hand, the highest effectiveness of multimedia films (e.g. on YouTube) is assessed by people living in cities up to 20,000 inhabitants (4.04) and the lowest by respondents living in the largest cities (3.82).

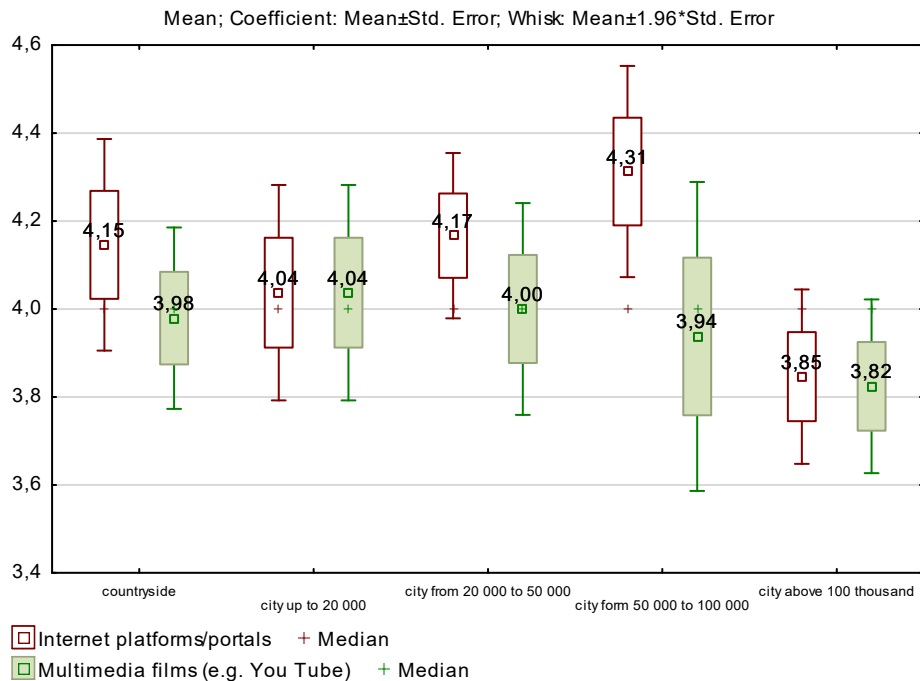


Chart 8. Average ratings of individual activation methods, broken down by place of residence.

Source: Own study based on research results.

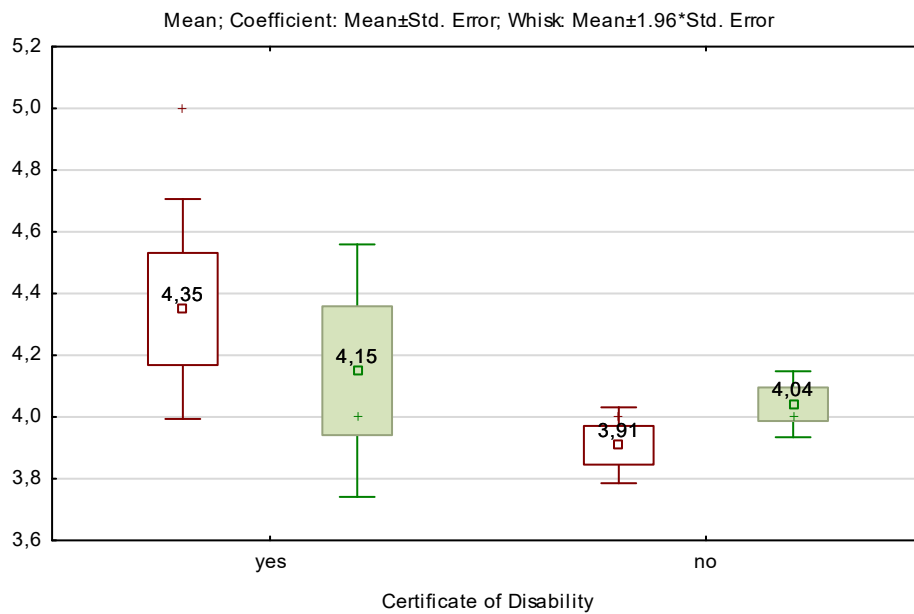
Also, having a certificate of disability has an impact on the assessment of the effectiveness of job placement  $p < \alpha$  ( $p = 0.0339$ ) and computer applications and programs as well as on smartphones  $p < \alpha$  ( $p = 0.0426$ ) (Table 8).

Table 8. U Mann-Whitney test results. Holding a certificate of disability and the assessment of traditional and digital activation tools

	<i>p</i> – (test probability)
job placement	0.0339 *
applications / computer programs / for a smartphone	0.0426 *

Source: Own study based on research results.

Chart 9 shows that the effectiveness of job placement (4.35) and computer or smartphone applications or programs (4.15) is rated higher by people who have a disability certificate.



  Job placement    + Median  
  Apps/programs for computer/smartphone    + Median

Chart 9. Average ratings for individual activation methods, broken down by having a certificate of disability.

Source: Own study based on research results.

Another variable that influenced the assessment of respondents' statements was the type of institution in which the respondents work. The conducted research shows that the type of institution influences both the assessment of traditional and digital tools. The test results are presented in Table 9.

Table 9. Kruskal-Wallis ANOVA test results. The type of institution and the assessment of traditional and digital activation tools

	<i>p</i> – (test probability)
internships / apprenticeships	0.0112 *
career counseling / counseling	0.0168 *
job placement	0.0424 *
referral to study in vocational education institutions	0.0465 *
internet platforms / portals	0.0432 *
gamification games / workshops	0.0499 *

Source: Own study based on research results.

The effectiveness of work experience and apprenticeships was rated the highest by respondents working in schools (vocational education – industry schools and technology) (4.44) and in regional and poviát public agencies (4.36), and the lowest by respondents working in institutions providing employment or vocational counseling services (3,65).

Respondents working in regional and poviát public agencies rated career counseling the highest (4.30) and respondents working in institutions providing employment or career counseling services rated it the lowest (3.75).

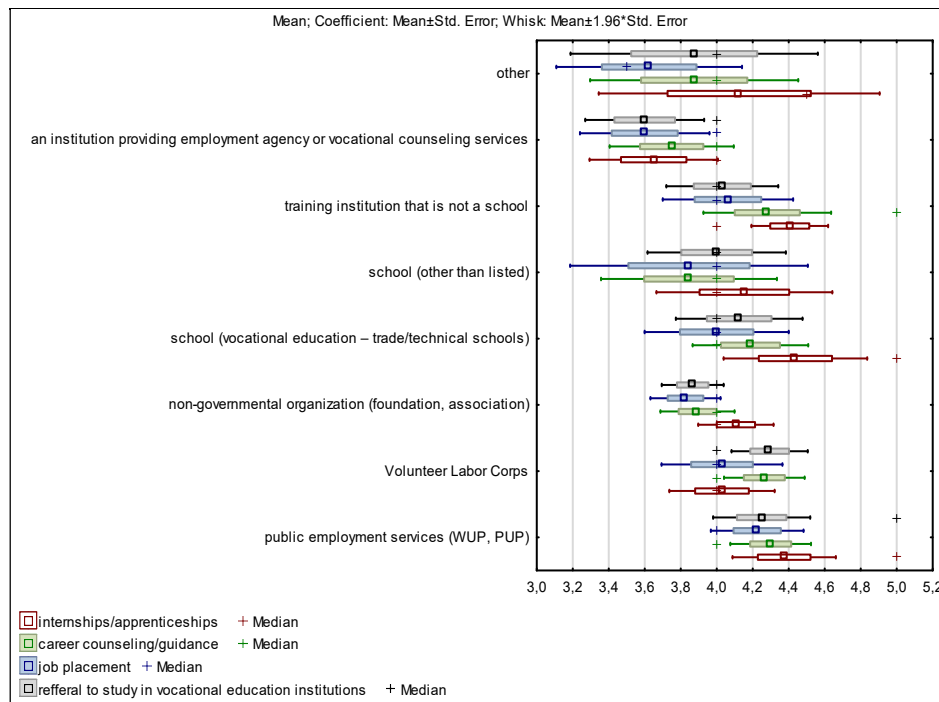


Chart 10. Average ratings of individual methods of traditional activation, broken down by the type of institution in which the respondent works

Source: Own study based on research results.

Efficiency – employment agencies were rated the highest by respondents working in regional and poviát public agencies (4.22) and the lowest (3.60) by respondents working in institutions providing employment or vocational counseling services.

In the case of evaluating the effectiveness of a referral to study in vocational education institutions as a tool for activating youth, it was rated the highest by respondents working in Voluntary Labor Corps (4.29) and the lowest by those working in institutions providing employment or vocational counseling services (3.60) (Chart 10).

In the case of the assessment of the effectiveness of online platforms and portals, respondents working in the public employment services assessed them as the most effective (4.38) and the lowest rating was by respondents working in institutions providing employment or career counseling services (3.70). Regarding the effectiveness of the game and gamification workshops as an activation tool, the respondents working in other workplaces (4.25) and in a training institution other than a school (4.09) rated them as the most effective, and those working in institutions providing employment or career counseling services the lowest (3.55) (Chart 11).

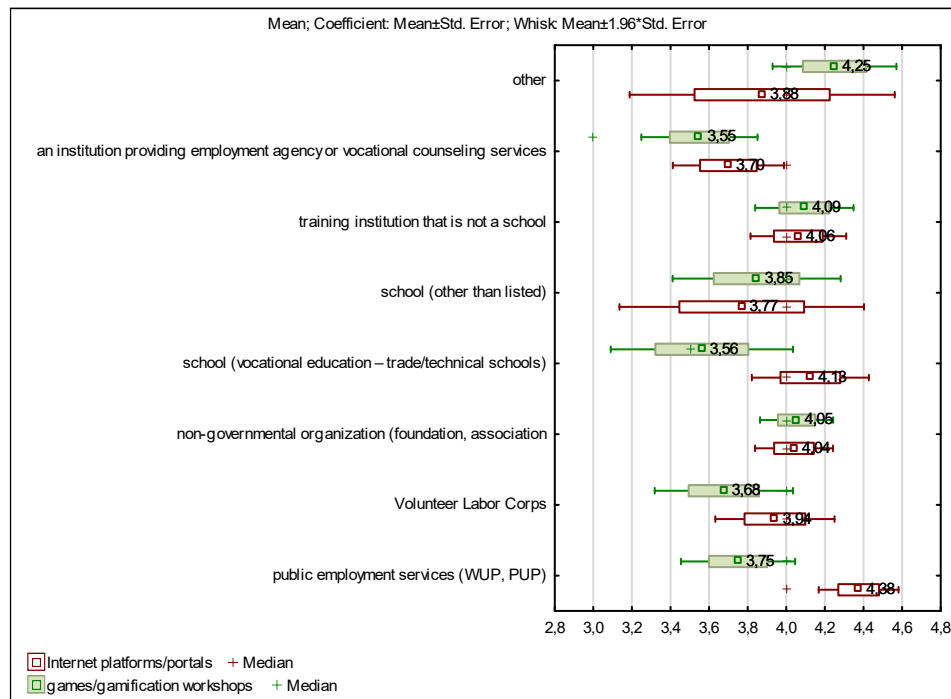


Chart 11. Average ratings of individual methods of digital activation, broken down by the type of institution in which the respondent works

Source: Own study based on research results.

The conducted research shows that the age range of the respondents had an impact on the assessment of training tools and vocational courses  $p < \alpha$  ( $p = 0.0461$ ) and the assessment of the effectiveness of digital diagnostic tests  $p < \alpha$  ( $p = 0.0324$ ) (Table 10).

Table 10. Kruskal-Wallis ANOVA test results. Education and traditional and digital activation tools

	<i>p</i> – (test probability)
training / vocational courses	0.0461 *
digital diagnostic tests	0.0324 *

Source: Own study based on research results.

Chart 12 shows that the highest effectiveness of training courses is assessed by respondents working with people in a different age range than those mentioned (4.24), and the lowest by respondents working with people from 25 to 29 years of age (3.83).

On the other hand, the effectiveness of digital diagnostic tests was rated the highest by respondents working with the youngest age group, aged 15 to 18 (4.10), and the lowest by respondents working with people aged 25 to 29 (3.91).

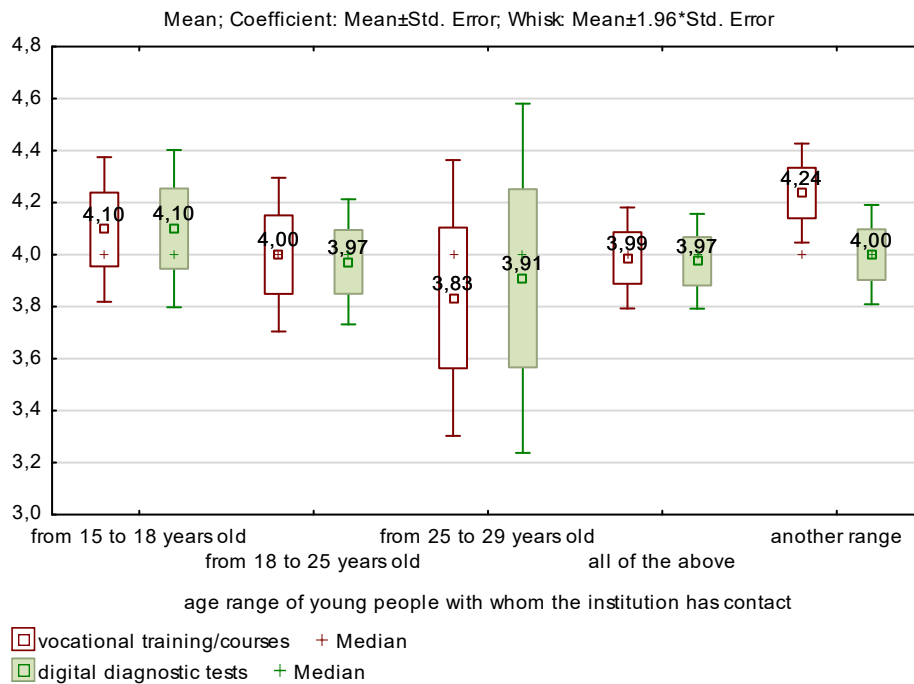


Chart 12. Average ratings of individual activation methods broken down by the age group of the respondents

Source: Own study based on research results.

The conducted research shows that the type of people the respondent has contact with had an impact on the assessment of two tools: e-learning training  $p < \alpha$  ( $p = 0.0032$ ) and the assessment of applications and computer programs for a smartphone  $p < \alpha$  ( $p = 0, 0325$ ) (Table 11).

Table 11. Kruskal-Wallis ANOVVA test results. The type of young people the respondent has contact with and the assessment of traditional and digital activation tools

	<i>p – (test probability)</i>
e-learning training	0.0032 **
applications / computer programs / for a smartphone	0.0325 *

Source: Own study based on research results.

Chart 13 shows that the effectiveness of e-learning training is rated the highest by respondents working with people from the category “other” than those mentioned (4.08), and the lowest by respondents working with people studying but not working for at least 4 weeks before the meeting (3.38).

On the other hand, the effectiveness of computer and smartphone applications and programs was rated the highest by respondents working with people who did not study and have not worked for a minimum of 4 weeks before the meeting (4.23), and the lowest was assessed by respondents working with people studying but not working at least 4 weeks before the meeting (3.69).

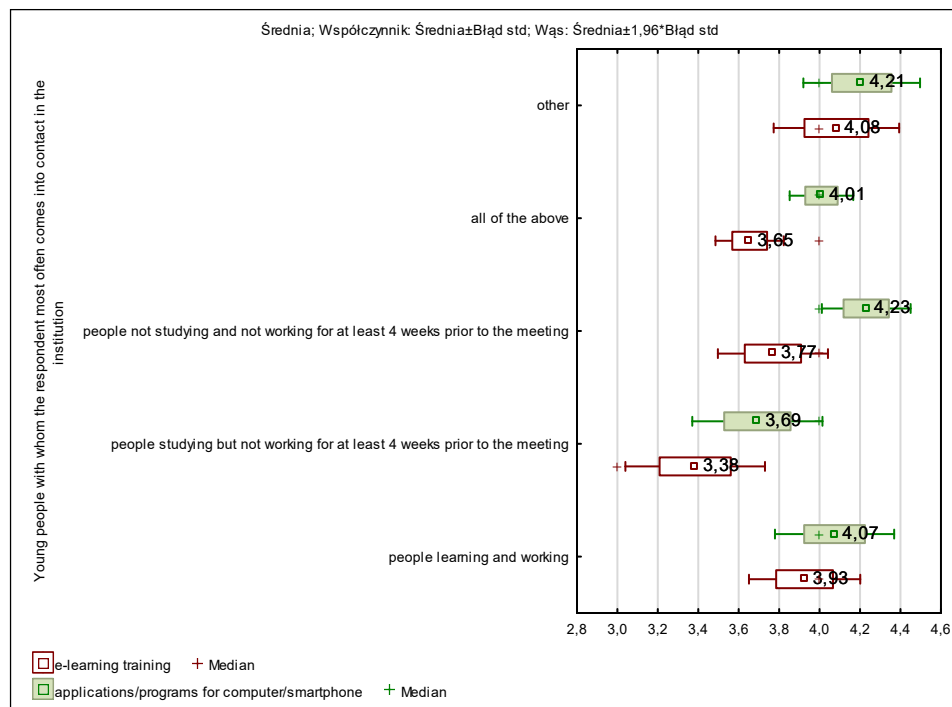


Chart 13. Average ratings of individual activation methods, broken down by the type of people the respondent has contact with

Source: Own study based on research results.

## 5. CONCLUSIONS

The conducted statistical analysis allowed us to maintain the hypothesis that people who deal with NEET youth support on a daily basis value traditional methods of professional activation more than digital methods. This is evidenced by higher average values of ratings awarded to traditional methods than to digital methods.

The analysis also provided an answer to the question: whether and what demo-social variables of the respondents have an impact on their assessment? First of all, it should be stated that the demoesocial variables impact the respondents' assessments. The variables that significantly influence the respondents' statements include: gender (impact on the assessment of the effectiveness of social training, counseling and career counseling, internet platforms and portals, computer applications and programs, and the effectiveness of games and gamification workshops), education (impact on the assessment of traditional and digital activation methods – internships and apprenticeships, training and vocational courses, referral to study in vocational education institutions as well as games and gamification workshops), place of residence (impact on the evaluation of digital activation methods – platforms and web portals as well as films), having a disability certificate (the effectiveness of job placement, computer applications and programs as well as smartphones), the type of institution in which the respondents work (impact on both the assessment of traditional and digital tools) and the age range of the respondents (impact on the assessment of two training tools and vocational courses, and to evaluate the effectiveness of digital diagnostic tests). Interestingly, the respondents' statements (in terms of the assessment of the effectiveness of individual activation forms) were not statistically significantly influenced by the age of the respondents.

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## **THE MEANING OF SERVICE DELIVERY PROTEST: A CASE STUDY OF SOUTH AFRICAN LOCAL GOVERNMENT**

The purpose of this article is to investigate the causes of service delivery protests in South African local government. The study utilized secondary data for the purposes of data collection. Local government in South Africa has witnessed lots of service delivery protest throughout the country and the cry is for effective and efficient public service delivery to the local communities throughout the country. It is vital to highlight that most of these protests are taking place as a result of corruption and bad management in South African local government. The general population is aware of this since media coverage of comparable incidents in South Africa is often quite public. The majority of South Africans are unemployed and they have to endure insurmountable poverty and deplorable living circumstances. As a consequence, the number of violent demonstrations in South Africa has increased.

**Keywords:** Corruption, Inequality, Protests, Poverty, Service delivery.

### **1. INTRODUCTION**

The establishment of democracy in South Africa gave millions of formerly marginalized people hope. The new administration reformed the public sector by establishing and passing laws to achieve justice and equality in service delivery. Despite the advances, the government's inability to effectively satisfy the demands of communities has resulted in recent service delivery demonstrations (Mpehle, 2012). Violence related with service delivery demonstrations has increased dramatically in recent years, resulting in the loss of

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life and property damage. Political violence has a long history in apartheid South Africa. However, despite the democratic regime, violence in service delivery demonstrations remains, with estimates ranging from 41.66 percent in 2007 to 54.08 percent in 2010 (Netswera, 2014). Alexander (2010) indicated that South Africa has seen a significant wave of aggressive local political demonstrations since 2004. In rare instances, they have reached insurrectionary dimensions, with people briefly seizing control of their townships, and the phenomena is best described as a poor uprising. There are striking parallels between the Mbeki and Zuma period rallies, particularly in terms of the grievances expressed, which are mostly about insufficient service delivery and a lack of responsibility on the part of local councils. The new administration is more legitimate. Perhaps, ironically, this has heightened the intensity of protest, with people assuming Zuma is more inclined to fulfil their requests. Despite democratic institutions such as the Constitutional Court and regular, mostly peaceful elections, protests persist in South Africa. The majority of South Africans are unsatisfied with democracy's advantages. Unemployment, housing, water and sanitation, energy, corruption and local government, health, and crime have all been mentioned as elements in the nationwide protests (Wasserman, Chuma, Bosch, 2018). This perception of relative impoverishment and inequality within an urban setting is critical to understanding why demonstrations occur. People will wait for services, but not if it seems like everyone else in their community is receiving them first. Add to it the marginalization and alienation felt by residents in informal settlements, as well as the overall hunger for services in these regions, and you have a recipe for disaster. In this milieu, a fast-spreading rumor of incompetence, corruption, or nepotism is all it takes to trigger a violent protest (Allan, Heese, 2011). Mass rallies, marches, and petitions have characterized service delivery in South Africa. These community responses, of collective voice political pressure, have become a defining aspect of ordinary people's reactions when local governments fail to act on community concerns. Some commentators see this as part of a larger issue that might lead to a revolution in the nation. While the more immediate issue is the irritation of promises not met about service delivery, the larger issue encompasses crime, the rising divide between affluent and poor, and the deterioration of government agencies (Akinboade, Mokwena, Kinck, 2013).

## **2. RESEARCH METHODOLOGY**

This article largely depends on secondary data for purposes of collecting data to fulfil its goals and address its underlying problem. It examined the existing literature to fulfil the study's aims, which are to analyse the reasons of service delivery protests in South African local government. Local government is the closest to the people and plays an important role in providing public services to local communities around South Africa. The numerous service delivery protests in South African local government is sending a statement about the country's present service delivery predicament. It is important to highlight that the majority of South African residents rely on social assistance. This article analyses the causes of service delivery protests in South African local government based on this assumption.

### **3. RESULT**

#### **3.1. Corruption as a barrier to service delivery in South Africa**

Corruption is more likely to occur in local government because of the procurement procedure. When it comes to service delivery, poor audit results, and financial management issues like corruption are common in South Africa's local governments (Munzhedzi, 2016). Mawenya, (2008) indicated that corruption occurs when clients and suppliers work together and disobey the law for personal gain, resulting in bribery. In most cases, bribery and fraud are involved. Because bribery needs to be disguised via deceit and dishonesty, it usually includes some degree of fraud. In contrast to bribes, unscrupulous procurement methods typically result in more financial waste. Public procurement is riddled with minor and grandiose corruption. Contracts for commodities, services, and modest projects for municipal governments are the most common places for petty corruption. Odeku (2018) indicated that the majority of South Africa's local governments have considerable degrees of corruption in their supply and procurement systems. As a consequence, establishing effective procurement and supply chain management agencies is critical for preventing corruption in local government. Corruption is one of the issues facing South African municipal governments and slowing service delivery. Local governments, via public officials, are intended to be foot soldiers in the delivery of public services; yet, they are vulnerable to corruption. Among the numerous issues confronting public service organizations in developing countries, corruption is one of the most ubiquitous and least addressed (Sebake, Sebola, 2014). Service delivery is critical in South Africa since it has been guaranteed, is anticipated, and is considered as important from the poorest to the richest for the country's progress in many fields. If corruption hampers efficient and timely service delivery, the country would be in jeopardy. Corruption also affects the financial resources that are available for service delivery since what is available is not used effectively. Arcane political judgments based on favours due and future electoral chances do not direct it to the most deserving or needed individuals or areas (Khotseng, Tucker, 2013).

#### **3.2. Disparity between urban and rural areas in service provision**

Most rural settlements in South Africa were left undeveloped after 1994, causing most inhabitants to struggle to make ends meet. Prior to 1994, municipalities were deliberately focused on supplying products and services to metropolitan regions at the cost of rural populations (Maramura, 2022). Inefficient and inadequate local government public service delivery is a key motivator for rural-urban migration. Many rural South African migration patterns are ascribed to push factors such as inadequate public service delivery caused by poverty, lack of employment opportunities, poor healthcare and education. The isolation of many rural areas has a detrimental influence on rural service delivery and, in general, contributes to rural-urban migration (Mubangizi, 2021). Rodseth, Notten and Von Blotnitz (2020) alluded that the influence of this difference is most obvious in the way that service is provided. In most cases, the number of services that are provided to households in rural areas is much lower, and the quality of those services is often worse as well. The historical inequities in the provision of development and services are crucial elements that contribute to this disparity. Other variables also contribute, but these are the most important owing to the political history of the country, the significant degree of poverty, as well as the logistical and financial challenges connected with expanding services to distant rural or inaccessible

informal regions. Akinboade, Mokwena, Kinfack (2013) indicated that the majority of the people in Africa, particularly in rural regions, does not have access to the most fundamental of the country's public services. The causes for defective service delivery are many and complicated, but the majority of the time, they are related to a lack of accountability, transparency, and dedication to making services work for individuals who are poor or disadvantaged. According to Booysen (2003), urbanized provinces in South Africa have benefits over more rural provinces when it comes to the supply of infrastructure, the ease of demographic transition, and the upgrading of standards in secondary education. Makale (2015) stated that the majority of South African municipalities are having trouble accomplishing their goals, which are outlined in the country's constitution, despite the fact that local authorities have been granted the authority to distribute and manage their own resources. An analysis of the performance of local governments finds that service delivery has improved in urban regions, however in rural areas, backlogs are being resolved at a very sluggish rate or, in some instances, neglected, which explains why there have been demonstrations over service delivery in rural areas

### **3.3. Income disparity as a driving force in the protests against service delivery**

South Africa is consistently recognized as one of the countries in the world that has the greatest income gap between its rich and poor citizens (Hundenborn, Woolard, Jellema, 2019). Inequality in terms of income has to be considered one of the most important underlying causes of the demonstrations in South Africa (Alexander, 2010). The Marikina Massacre, which occurred in August 2012, brought to light the most precarious configuration of forces in post-apartheid South Africa. This configuration was created as a result of deeply ingrained social and financial disparities, as well as ecological degradation, indebtedness, and corruption. Over the course of many years, dissent against the established power relations had been building up, with impoverished communities registering thousands of so-called "service delivery protests." These demonstrations appeared to have neither been resolved nor developed into long-lasting social movements (Bond, Mottiar, 2013). South Africa is nevertheless plagued by high rates of unemployment, economic inequality, and poverty, despite the fact that it is one of the richest countries in the area. Inequalities in service delivery in South Africa may be traced back to historical remnants (legislation) that have had an effect on the resources and effectiveness of local governments. On the other hand, inequality is a problem that affects people all over the world, and city planners have traditionally given priority to providing limited resources to the wealthy at the cost of the poor (Sartorius, 2016). South Africa has experienced an upsurge in 'service delivery demonstrations' – protests connected to insufficient service provision – in recent years as a consequence of rising public anger caused by high levels of income disparity. The demonstrations are about more than simply service delivery; they are also about inequality and overall socioeconomic unhappiness, as well as residents' perceptions that the government is not listening or reacting to their predicament (Wasserman, Chuma, Bosch, 2018). The level of income disparity in the South is among the greatest in the world. This is one of the reasons why the local government sector has seen plenty of demonstrations; this is due to the fact that the majority of rural residents are dependent on the services provided by the local governments (Ataguba, Day, McIntyre, 2015). The majority of impoverished people in many South African rural communities do not have access to essential amenities. As a result, people protest by going to the streets and demanding improved service delivery. Protests over service delivery are common in South

Africa. Those who are socially excluded perceive no difference between the present political regime and the previous one. Protests against service delivery take place at the local level, closer to the people who use these services (Sartorius, 2016).

#### **3.4. Poverty and unemployment as a factor in the protests against service delivery**

The South African government recently commemorated the first quarter century of democracy. While the festivities marked significant progress in the realization of democratic ideas, they were not universally welcomed by residents living in poverty and unemployment. South Africa has a 27 percent unemployment rate, with more than 55 percent in poverty. The government's inability to deliver on its promises has fuelled growing rage among residents imprisoned in poverty, unemployment, and landlessness, as seen by the continuous service delivery demonstrations (Khambule, Nomdo, Siswana, 2019). Protests against service delivery are more common in informal residential areas, where unemployment and poverty are highly prevalent. The bulk of these protest acts take place in South African local government informal areas. South Africa's shift from apartheid to democracy may be characterized as a period of "thwarted aspirations" and unmet promises, which sparked violent riots. These are the areas with the highest rates of unemployment and poverty (Breakfast, Nomarwayi, Bradshaw, 2020). Pekeur (2018) indicated that poverty is one of the primary issues confronting municipalities. Many houses under the authority of smaller towns are impoverished, with just a tiny fraction of household members working. This has hampered families' ability to pay for municipal services. This has larger ramifications for service delivery since it limits a municipality's capacity to reinvest funds in service delivery rollouts. Rurality has caused poverty to residents of townships, villages, and agricultural communities, especially black women. Their lives are defined by a scarcity of fundamental commodities and services such as food, clothes, and shelter. Protests against service delivery are sparked by the difficulties experienced by women and youth. The demonstrations show that many criticize the government and local governments for not doing more to alleviate poverty among citizens (Thaba-Nkadimene, Molotja, Mafumo, 2019). In other circumstances, hostility against governmental institutions may emerge from frustration caused by poverty and unemployment. In many cases, though, responsibility is assigned in a manner that discourages mobilization (De Juan, Wegner, 2019).

#### **3.5. Disruption to service delivery caused by Cadre Deployment**

Cadre deployment is marked by issues such as a lack of transparency and accountability, misappropriation of funds, fraud, corruption, and overall poor performance, as seen by service delivery caseloads in the supply of water, shelter, and sanitation. The scarcity of skills to provide basic products and services generates service delivery demonstrations against inadequate governance and consequent conflict. Several towns around the county are consistently failing to successfully organize their work, manage their projects skilfully, and plan their budgets sensibly, and a shortage of skilled professionals in technical sectors limits their capacities (Shava, Chamisa, 2018). Since the ANC gained power in the first post-apartheid democratic elections in 1994, it has established a strong loyalty to its members, putting 'cadres' in all areas of government. Because of the military battle against the white National government under apartheid, the word "cadres" has been used to identify ANC followers. South Africa is at significant danger because the governing party (ANC) is choosing and deploying cadres inside municipalities, which is an indication that politicians are abusing their position. The amount of risk in municipal government is significant since

there is no merit system in place for hiring (Masuku, Jili, 2019). Cadre-deployment has a detrimental influence on service delivery since persons in crucial positions are not qualified for the role but are merely politically powerful. Corruption has grown in South Africa as a result of cadre deployment. Political detainees are not assigned based on merit, experience, or academic qualities. They are merely being used to prolong patronage and monopolize power among individuals politically linked to the ANC (Nomarwayi, Bradshaw, Breakfast, 2012) The ANC's cadre deployment strategy, which emphasizes hiring individuals based on their loyalty and lengthy service in the organization, has an influence on service delivery since it employs inept and unqualified staff who fail to execute their jobs. This has resulted in poor service delivery in local government around the country, as seen by the country's periodic service delivery protests (Mngomezulu, 2020).

### **3.6. A link between maladministration and service delivery protests**

In situations where there is no public official are not accountable, there is a clear possibility for misbehaviour and maladministration to reveal itself, which ultimately results in the government being unable to fulfil its duty of service delivery (Rulashe, Ijeoma, 2020). The provision of municipal services is often hampered by allegations of financial irregularities, maladministration, and mismanagement; this, in turn, causes residents to lack faith in the system and to protest against the provision of municipal services (Kroukamp, Cloete, 2018). The municipalities in South Africa experiencing issues such as losing reputation, investors refusing to invest in them, communities opposing service delivery, maladministration and unexpected changes in leadership. This is occurring in South Africa. This is often due to councillors lacking the necessary expertise or towns lacking a framework for implementing corporate governance. Municipalities will struggle to choose which aspects of governance to control and how to manage them without robust corporate governance systems (Masegare, Ngoepe, 2019). Most local governments lack experience in disciplines like as financial management, engineering and project management, leaving them understaffed, resulting in enormous service delivery backlogs throughout the country. This has hampered municipalities' ability to deliver basic services and finish development projects, denying underprivileged people in South Africa access to the services they are legally entitled to. Inability to supply services is linked to maladministration and inability to finish development initiatives. Most municipalities in the country are struggling to manage their budgets (Mashamaite, 2014).

### **3.7. Poor Public Participation and service delivery protests**

Many protestors are frequently upset over being excluded from local government decision-making processes. Municipalities are obligated to create an inclusive and participatory culture of municipal government, as stipulated by Section 16 subsection (1) of the Municipal Systems Act (2000). It is vital for local administrations to promote citizen engagement in decisions that directly affect them. The service delivery demonstrations and rallies show that participatory democracy is a major difficulty in democratic South Africa, and as a consequence, low public engagement contributes to local government underdevelopment (Modise, 2017). The right of the people to participate in the governance process is a constitutional requirement that is safeguarded by several policy frameworks that regulate local governments. The goal of community engagement is to give knowledge while also improving public choices, programs, and initiatives. Without a doubt, public engagement is a constitutional as well as a legal need (Mamokhere, 2020). Municipal



community engagement practices have an impact on service delivery and, perhaps, incite violent unrest. While protest is one of the rights guaranteed by the constitution, the violence that has followed protests concerning service delivery has highlighted problems about public ownership and responsibility in relation to municipal prioritization of services to be supplied. In recent years, South Africa has confronted a problem of strong violent service delivery protest (Nembambula, 2014).

#### 4. DISCUSSION

Managa (2012) alluded that among the key obstacles confronting local government are significant issues of institutional capability, mishandling of finances, high levels of corruption, and a lack of public involvement. These are major difficulties that impede local government functioning and lead to service delivery protests and demonstrations. Corruption is a major concern in the country's bureaucratic culture, political development, and social history. As a result of pervasive corruption, which poses a dangerous threat to the Constitution, local governments are perceived as "havens for those who are milking" those same state resources. Even more worrisome is the fact that high-ranking national and municipal authorities have been accused of inappropriate tendering, bribery, and illegal expenditures. The stability and growth of South Africa have been severely harmed by the country's endemic corruption. Lack of ethical leaders in the public sector has developed a culture of fraud and corruption, where openness and accountability are discouraged rather than promoted. The number of high-ranking state officials who have been shown to have breached their oaths of office in South Africa is perplexing, prompting residents to stage protests and demand better service delivery (Masuku, 2019). Many rural municipalities lack the competence to establish local fiscal tools, such as tax collection. It is necessary to reconsider how the equitable share is computed and distributed in order to make the allocation to rural-based municipalities more equal. Municipalities depend largely on national transfers to meet their constitutionally required water, transportation, and economic development duties. Many rural municipalities lack enough means to provide effective services to rural areas as a result of inequitable resource allocation from the national treasury, which has resulted in service delivery protests and demonstrations. Local governance in rural regions is neglected in comparison to local government in metropolitan areas (Mubangizi, 2021). Basic sanitation, much alone garbage disposal, is a dream in some towns, particularly in rural areas. Most individuals utilize 'rubbish dumps' behind their homes or put garbage wherever it is convenient. In other words, fundamental service levels are poor and, in many cases, non-existent, particularly in rural and disadvantaged areas of the country (Koelble, LiPuma, 2010). Protests in South Africa occur for a variety of causes. The main cause is discontent with basic municipal amenities such as running water, electricity, and toilets, particularly in rural and informal settlements. service provision Protests in rural regions demonstrate how a lack of knowledge often leads to the quick spread of rumors of favouritism, corruption, and incompetence (Mamokhere, 2020). Protests against service delivery are becoming more common in rural villages, where unemployment and poverty are prevalent and municipalities lack technical and organizational capacity. Poverty with local origins, a lack of financial stability, and poor living conditions are all connected to service delivery protests, as is a high crime rate and a lack of participation in community activities such as meetings or groups (Ngcamu, 2019). The cadre deployment strategy has had a detrimental effect on both governance quality and

service performance. The ANC's cadre deployment policy has placed inexperienced political officeholders in charge of public service delivery in several government ministries. This is the source of the problem (Mlambo, Zubane, Thusi, 2022). Transparency has never prevailed in practice, even when inquiries are received on a specific transaction or for an individual appointment. The municipality does everything behind closed doors. Instead of skills and qualifications, appointment is based on corruption, favouritism, and cadre deployment. The municipality in South Africa allocate certain contracts to official's relatives. In South African local government, the political-administrative relationship also trumps openness (Maramura, 2022).

## 5. CONCLUSION AND RECOMMENDATIONS

South Africa is categorized as a developing country, and citizens rely more on government services. This is because growing economies have less economic opportunities, resulting in more unemployment, poverty, and social inequality. This is also true in South Africa, where the majority of individuals are impoverished and unemployed, and socioeconomic inequality is widespread. This is because of the increasing demand for public services, effective and efficient service provision is an essential issue in South Africa. South African citizens were promised basic services, which explains the country's high service delivery demonstrations. Corruption, maladministration, rural area marginalisation, economic disparity, cadre deployment, poverty, and unemployment are all serious factors for the rise in service delivery protests in South Africa. South Africa's government must encourage and enable local governments in both rural and urban regions in order to provide equitable service delivery to all inhabitants. It was the aim of this paper to investigate the causes of service delivery protests in South African local government. Therefore, the aforementioned are amongst the central causes of service delivery protests in South Africa. This paper further suggests the following measures for stakeholders (government, civil society, business and individuals) involved in address service delivery protests in South Africa.

Firstly, the government must devise measures to address corruption in local government, which has a negative impact on public service delivery. Furthermore, Local governments must also respond to residents' demands and encourage community engagement in both rural and urban regions. Local government as the sphere that is closer to the people will always be impacted by service delivery protest, therefore the central government must recognise that the promised democracy is vested on the local government sphere and it should be prioritised in the public sector through sufficient financial support and attraction and retentions of skilled employees who are meets the requirements of the post and also establishment of financial controls in local government to deal with issues of fraud and corruption. Thus, the public service delivery will be enhancement and service delivery protest might be reduced.

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**Katarzyna Coombs-Hoar:** Influence of culture on the English language – the press as a creator of new idiomatic expressions

**Dariusz Czekaj:** A sociological analysis of the perception of the 21<sup>st</sup> Podhale Riflemen Brigade as a social institution by members of the local communities of the Podkarpackie region

**Victor H. Mlambo, Daniel N. Mlambo:** Disunity in times of crisis: COVID-19, geopolitics and vaccine nationalism

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**Katarzyna Szara, Roman Fedan, Bogusław Ślusarczyk:** Cognitive biases as a reaction to the COVID-19 pandemic from the perspective of behavioral economy

**Karsten Weber:** Cybersecurity and ethical, social, and political considerations: When cybersecurity for all is not on the table

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**The Journal annually publishes a list of reviewers: in the last issue of the quarterly – No. 4 (2022) and on the website:**

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Reviewing standards, information for authors, the review form, instruction for authors and contact details to HSS Editors and to Publishing House are also published in the fourth number of *Humanities and Social Sciences*, 29, No. 4 (2022).



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1. Does the title of the paper reflect the content sufficiently?     Yes     No
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