

ISSN: 2450-6869

eISSN: 2719-6763

No. 11, 2021

# DEFENCE SCIENCE REVIEW


<http://www.journalssystem.com/pno/>

DOI: 10.37055/pno/149216

## Analysis of the social and living conditions of professional soldiers in Poland in the first two decades of the 21st century

### Original article

Ryszard Chyrzyński<sup>1,A-F</sup>

ORCID  0000-0003-2362-6826

Received: 2022-03-15

Revised: 2022-04-12

Accepted: 2022-04-14

Final review: 2022-04-14

<sup>1</sup> Wojskowa Akademia Techniczna im. Jarosława Dąbrowskiego w Warszawie

A – Research concept and design, B – Collection and/or assembly of data, C – Data analysis and interpretation, D – Writing the article, E – Critical revision of the article, F – Final approval of article

### Peer review:

Double blind

### Keywords:

average remuneration of soldiers, remuneration system of professional soldiers, social and living conditions of soldiers, social and living situation of professional soldiers and their families

### Abstract

**Objectives:** The aim of this paper is to perform an evaluation of the social and living conditions of professional soldiers and their families in Poland at the beginning of the 21st century and two decades later.

**Methods:** The research methods used in this study are: literature analysis and review and the method of logical analysis and structure.

**Results:** The analysis of the available sources allowed the author to draw the conclusion that the appropriate status level of a professional soldier may realistically contribute to the improvement of the overall state of social security of both the soldiers and their families, as well as of the capacity of the armed forces, provided, however, that the organisational and legal conditions are fully adjusted to their needs both during service and after termination.

**Conclusions:** Professional soldiers serve in the conditions that result from currently existing organisational, systemic, and legal solutions that secure the process of realisation of the tasks for: the Armed Forces of the Republic of Poland, the state of Poland, and the North Atlantic Treaty Organisation (NATO). The social and existential situation of professional soldiers and their families is influenced by numerous, different factors, both external (political or economic) and internal (departmental) ones, as well as those connected to the course of performing professional military service: the structure of the armed forces and the types of tasks performed in the country and abroad.

This work is licensed under the Creative Commons Attribution-NonCommercial-NoDerivatives 4.0 License

## **Introduction**

The inspiration to write this paper were the materials created in the years 1999 and 2002 at the Department of Economics of the Ministry of National Defence that were presented during the session of the Parliamentary Committee for National Defence and the Management of the Ministry of National Defence in Poland. The said materials contained an evaluation of the financial situation of military families at the beginning of the 21<sup>st</sup> century. They were developed based on the sociological research conducted by the Department of Economic of the Ministry of National Defence and the Military Office of Sociological Studies among professional soldiers to analyse their material situation. The documents also presented the actions taken by the Ministry in order to improve the social and living conditions of those soldiers and their families.

The State of Poland, in its socio-economic policy, applies not only subjective or regional preferences, but also preferences for various professional groups, including professional soldiers, on every stage of its development.

The basis for various preferences may be different values that determine the role and significance of a given professional (employment) group in the production, political or social spheres. Currently, hardly anyone has any doubts why, for example, miners as a professional group, used to enjoy highly preferential treatment in Poland.

At the time there was also a general opinion about special preferences (rights) granted by the state to professional soldiers, who are responsible for the fate of the nation and the state in terms of defence. As a result, the socio-economic policy of the state contains several aspects that refer to professional soldiers, armed forces, national defence, etc.

The political transformation that took place in Poland in the 1990s led to a series of significant transformations in the social, political, and economic life, which have also affected professional soldiers, to different extents.

This resulted from the need to introduce deep and rapid structural, organisational, and personal changes to the Armed Forces of the Republic of Poland, including, in particular, the technical modernisation of the army and the manner of its financing.

Although these changes focused mainly on the technological modernisation of the armed forces (i.e. improving the mobility and efficiency of the army), they also led to several social repercussions, which affected the socio-economic situation and the attitudes of professional soldiers. These changes, which resulted to a large extent from commonly binding conditions, have also influenced the existing system of remunerations of professional soldiers

or the military retirement system. These changes were particularly difficult, as they involved not only complex organisational, legal, and financial conditions, but also moral, psychological, and social aspects that resulted from their implementation.

Throughout this period, the process of introducing changes to the Polish Armed Forces was accompanied by various protective actions that took into consideration, to a large extent, the general socio-economic and legal conditions. These actions constituted a set of organisational and legally regulated activities taken with the aim to maintain the existing systemic discrepancies that were beneficial for the military circles in many areas, or modifying them in order to improve the social and living conditions of these soldiers and their families.

Social and living conditions are one of the conditions for the proper performance of professional tasks by soldiers for the defence of the state and at the same time one of the risk factors for disturbing their moods.

Therefore, the general economic state of the state, the applicable organizational and legal regulations, both general and departmental, had a significant impact on the formation of the social and living situation of professional soldiers and their families.

The situation of professional soldiers in the periods studied was slightly more favorable than that of employees employed in the national economy or in the sphere of enterprises.

Looking at the mood among these soldiers, it can be concluded that they were, both at the beginning of the period under study and 20 years later, critical but with a noticeable tendency of slight improvement. Similar moods could also be observed in society.

### **1. Emoluments of professional soldiers at the beginning of the 21<sup>st</sup> century**

The “emolument” is defined as a type of regular remuneration or salary received by a specific professional group (soldiers, police officers and other members of uniformed services, as well as members of the Parliament, senators and judges) under a service relationship (*Słownik języka polskiego*, vol. 3, PWN, Warsaw 1988).

The emolument, similarly to remuneration, performs three main functions: as a revenue, stimulus, and cost. All these functions exist simultaneously, but each of them is accompanied by other phenomena and regularities. For soldiers, the function of emolument as revenues is the most important. This is understandable, as for most of them, the emolument is the main source of personal income as a result of the limitations connected with performing this type of service.

Thus, the amount of such emolument should not be grossly disproportionate to income received for employment by other professional groups (uniformed services or professional groups). This is why the income of soldiers as a professional group is shaped by the institutions of the State. In practice, both the revenue function, and the other functions of the emolument are performed mainly by the system of remunerations of soldiers that exists at a given time. As a result, it may be subject to comparative analysis.

The average emolument of soldiers is a multiplication of the base amount, which is specified in the *Budget Act* (Art. 2 item. 4, Act., 1974). The determination of the multiplication of this amount, which is defined by the President of the Republic of Poland, takes into consideration the prestige of the profession of a professional soldier as well as the obligation of the State to guarantee those soldiers decent living conditions that allow them to perform service to their Nation and Home Country and compensate for the hardship, limitations, and sacrifices connected with performing regular military service (Chyżyński R., 2018, p. 173).

In the year 2001 it was the base amount used for calculating remunerations in the state budget sector (Art. 11 and 12, Act., 2009) multiplied by 2.05 (Act. 2001, soldiers and employees who started: before January 1 1999 – 1 303,57 PLN, after January 1 1999 – 1 556,65 PLN), and it was higher by 0.17 than the same multiplication in the preceding year.

At the same time, it is worth noting that the year 2001 was the first year when the multiplication factor was increased after a five-year period (1996-2000) during which the factor had been kept on the same level (1.88). However, this did not significantly improve the decrease in the income of professional soldiers in comparison to the remunerations of persons employed in the public sector and the sector of enterprises, which took place in the years 1996-2000.

These relationships resulted, first of all, from the different priorities adopted by the state policy at that time with respect to the remunerations of employees, in particular specific professional groups or groups of workers. This referred mainly to the employees of the private sector, where, after the super-normative wages tax (so-called „*popiwiek*” had been cancelled, the salaries increased dynamically.

At that time, the average gross emolument of professional soldiers together with 1/12 of the annual bonus amounted to 2 845.40 PLN and it was higher by 677.40 PLN (i.e. by 131.3%) than the average remuneration not including dividends of workers employed in the public sector, and by 669.40 PLN (by 130.8%) than that of employees in the sector of enterprises.

When evaluating the level of the average emolument of professional soldiers, it should be noted that it was slightly higher than the remunerations of employees in the public and enterprise sectors. However, this was not very comforting in the light of the feelings of dissatisfaction with the amount of the remuneration in comparison to the emoluments of members of other uniformed services, where the emoluments were growing more dynamically. In the years 1996-2001 the multiplier of the base amount for employees of the Office of State Protection increased from 1.81 to 2.25, for the Police from 1.61 to 1.93, for the Border Guard from 1.73 to 1.96, the Penitentiary Service from 1.56 to 1.84, and for the National Firefighting Services from 1.34 to 1.75. This dissatisfaction was commonly expressed in the military forces at that time.

Here, it is worth noting that the average level of soldiers' emoluments is only a statistical value, so it may be only used for comparisons of a general nature. It certainly does not reflect the level of remunerations of individual soldiers, and, as a consequence, the actual living conditions of these soldiers and their families. Apart from the conditions discussed above, the amount of the individual emolument of each professional soldier was influenced by:

- their military rank;
- years of service;
- the position held, determined by the so-called "U" group (group of emolument according to the position);
- the amount and number of benefits granted to this emolument.

The emolument of professional soldiers consisted of two main elements, i.e. remuneration depending on:

- military rank, and
- position.

This remuneration was characterised by an obligatory, centrally determined level of emoluments on specific positions and it was adapted to the organisational structure of the Armed Forces of the Republic of Poland and the model course of service of their soldiers, as well as to the capacity of the State Budget. Due to that, when evaluating the functioning of this system the systemic solutions should be clearly separated from the level.

At the same time, it should be noted that, starting from January 1 1999, the emolument of professional soldiers who commenced the service after December 31 1998 was subject to grossing up (Act., 1998) to include the social security contribution. This led to the need to determine separate rates of base emolument, both according

to the military rank and to the position, for soldiers who were and were not subject to mandatory social security. The other part of the base emolument of these soldiers consisted of specific benefits.

The base emolument according to military rank depended on the number of years in military service and increased every 3 years, until reaching 35 years of service. At the same time, the number of years in service included other periods of service and work performed before joining the armed forces, regardless of their nature, as well as the period of studies at a civilian university, however not longer than the statutory duration of military studies.

The second main element of the base emolument was the emolument based on position, which reflected the scope of professional duties, level of responsibility, and the qualification requirements necessary to hold positions in the organisational units of the Polish Armed Forces and outside the military forces.

The position held was the main factor that determined the differences in the emoluments of professional soldiers. It was mainly connected to the different levels of complexity of the tasks performed in different positions. In order to determine the appropriate levels of emolument for specific positions, 34 emolument categories were adopted (the lowest emolument group was the U-32 group, and the highest – the U-A group), which included individual positions that were foreseen for professional soldiers.

Additional benefits to the base emolument reflected preferences for soldiers who performed service in particularly difficult or tedious conditions (e.g. pilots or navy soldiers), as well as those whose qualifications were higher than average (e.g. non-commissioned officers or warrant officers who were classified as at least 2<sup>nd</sup> class military specialists).

The existence of these benefits was justified mainly by the need to take into consideration the specific conditions and properties of service that were significantly different from the average. The existing benefits may be divided into:

- permanent benefits – defined as monthly rates and paid together with the emolument;
- non-permanent (temporary) benefits – granted to soldiers for performing specific activities.

All these benefits, with the exclusion of the special benefit, were determined parametrically in relation to the lowest base emolument of a professional soldier (Master Corporal with less than 2 years of service according to the 32<sup>nd</sup> emolument group).

The largest group of permanent benefits included benefits justified by specific properties or conditions of performing military service. They included:

- benefit for serving on the sea – granted to soldiers who performed service on watercrafts and in the command of a group of vessels;
- assault forces benefit - granted to soldiers who perform service in landing, assault, and special units as well as other military units (institutions) in full-time positions of parachuting instructors and parachutists;
- benefit for aircraft personnel – granted to soldiers who perform services in aircraft personnel (pilots and navigators) and perform flights;
- for direct aircraft service members – granted to soldiers who perform services in direct ground services of aircraft and helicopters, climbing and rescue equipment, and objective flight control;
- for services in harmful or tedious conditions – granted to soldiers who perform service in conditions harmful for health, in the amount depending on the degree of harmful factors and their intensity;
- inspector benefit - granted to soldiers who perform service at the Department of Control, the Department of Armament Control of the Department of Foreign Co-operation, in control organs of other organisational units of the Ministry of National Defence, in military districts (equivalent) and organs responsible for the protection of classified data as well as soldiers who perform inspection (control) activities;
- for professional soldiers of the Military Information Services, Military Gendarmerie, and the Military Cryptography Office – granted for performing service at these units, directly connected with performing intelligence and counter-intelligence, operational and reconnaissance, investigation and administrative activities;
- for company commanders – granted to regular warrant officers and non-commissioned officers who perform service in full-time positions of company leaders;
- service benefit – granted to soldiers for each day of performing their professional duties at Military Unit No. 2305, a military unit, element of a military unit or a sub unit allocated to the response forces of the North Atlantic Treaty Organisation or in multinational military units;
- special benefit – granted for special properties or conditions of performing service, depending on the rank, position held, and the type of military unit. The amount of the benefit was 38% on command positions on the levels of regiment and higher, 36% for commanders of independent battalions, divisions, squadrons, and warships, from 30 to 34% for commanders of other units or sub-units and deputy commanders, 27% in

other positions. This benefit could be increased due to performing other duties, at the maximum up to 10% of the emolument, based on the position held.

On the other hand, benefits based on soldiers' qualifications included the following benefits:

- class of qualifications benefit – granted to professional warrant officers and non-commissioned officers who possessed the 2nd or higher class of military specialists in the specialties corresponding to the positions held;
- medical specialisations – granted to physicians, dentists or pharmacists who had the specialisation in medicine, dentistry or pharmaceuticals.
- Other, non-permanent benefits granted to professional soldiers include:
  - zone benefit – granted to soldiers who sustain a spouse who was not employed or children and perform service in remote garrisons (not being towns, from which the journey to the nearest town lasted more than 1 hour, for soldiers who lived with their family members);
  - for parachute jumps – granted for actually performed jumps;
  - diving benefit – granted for each minute of diving, in the amount depending on the depth where the task was performed;
  - operational benefit – granted to soldiers who perform duties outside their garrison, in connection with military training in field conditions, participating in exercises on stationary control stations as mediators and participating in combating natural disasters and collecting and destroying ammunition.

Other types of payments that resulted from the system of soldiers' emoluments were financial payments and benefits connected with the appointment for regular military service and release from such service (Act, 1970, 1974 and 1993).

After taking over the position, soldiers appointed for regular military service performed in form of permanent or contract service received a settling-in allowance in the amount equivalent to 1-month base remuneration, together with permanent benefits.

Soldiers who were released from regular military service were entitled to the following payments and benefits:

- severance payment, whose amount depended on the duration of interrupted military service performed as permanent service. The period of uninterrupted regular military service included periods of overtime compulsory military service and temporary and contract military service, provided that the soldier was appointed to regular military service performed as a permanent service directly from such service and did not



receive severance pay for the previously performed service. Soldiers who were released before they served 10 years of uninterrupted military service performed as permanent service were entitled to severance pay in the amount equal to the last emolument for 3 months. This severance payment was increased by 20% of monthly emolument for each full year over 10 years of service, to the maximum amount of 600% of the monthly emolument. Soldiers released from active military service performed as contract service were entitled to severance pay in the amount of 1 month's emolument;

- emolument paid monthly for a year after releasing from military service – soldiers released from regular military service performed as permanent service were entitled to the monthly emolument together with permanent benefits as due on the last held position, for a period of one year following being released from service. In the event of coexisting rights to such emolument and the retirement or pension under military retirement scheme, the soldier was entitled to choose one of these benefits at their own discretion. Soldiers who chose to receive 12 months' emolument could receive it once, in advance, for the whole period. However, soldiers who were released from contract service were not entitled to such emolument. Such remuneration, whether paid monthly or once in advance was not subject to indexation regardless of any potential pay raises introduced in the period for which it was due. This emolument was calculated based on the emolument due in the last position held;
- cash equivalent for holiday leave unused in the year of release from service and all outstanding holiday leave – paid, if applicable, on the day of release from service (both permanent and contract service) for each unused holiday leave, including outstanding holiday leave from previous years and additional leaves (holiday leaves). The amount of this equivalent was 1/30 of the emolument (calculated as for severance pay) for every unused day of holiday leave;
- reimbursement of the costs of a single journey of the soldier and their family members and the costs of transport of household equipment to the place of residence chosen by the soldier. Soldiers were entitled to receive this reimbursement only once, but at any moment after release from the army.
- In some special cases, professional soldiers released from service were also entitled to:
- one-off compensation for damages (Act., 2001) - granted to soldiers who perform permanent and contract service released from the military forces upon notice filed by the competent military authority in the years 2001 – 2003, in the event of shortening

the period of notice. This period was shortened on the request of a professional soldier. The compensation was paid for each month of shortening the notice period, in the amount of 1 month's emolument due to the soldier in the last position held (i.e. from 1 to the maximum of 8 months emoluments). The compensation was payable regardless of any other payments and benefits due as a result of the release from service. It was subject to lump-sum taxation, on the same principles as the emolument due to soldiers for the period of one year following the release from service.

Moreover, on the day of release from service, these soldiers also received other payments if they had not exercised the relevant rights while performing regular military service, namely:

- a lump-sum cash equivalent for the journey at the expense of the military forces unused in the year of release: professional soldiers and members of their families were entitled to travel once a year to any place in Poland at the expense of the military forces, or to receive a lump-sum cash equivalent for such trip;
- holiday pay – soldiers who had not collected their due holiday pay for the year in which they had acquired the right to holiday leave received it on general terms on the day of release from active military service.
- anniversary bonus – paid on general terms;
- annual bonus – soldiers who were released from service before the Polish Army Day were entitled to receive this bonus in the amount proportional to the number of months of service in the year of release (i.e. 1/12 for each month of service). The base for calculating the bonus was the emolument due to the soldier in the last month preceding the release from service (i.e. for the month preceding the month in which the soldier was released).

At the same time soldiers who were released from regular military service upon notice filed by a military authority also retained the right to use the accommodation even though they did not acquire the right to military pension or retirement. Such soldiers were also entitled to receive:

- an accommodation equivalent – i.e. a cash equivalent payable to persons entitled to separate permanent accommodation for performing renovation works at the premises. The amount of this equivalent depended on the type of household equipment and the number of standards to which the professional soldier was entitled;
- equivalent for giving up or purchasing the premises – in the amount of 3% of the value of the accommodation for each year included in the period of service that constituted

the basis for calculating military emolument, based on military rank. This equivalent could not, however, be lower than 65%, and higher than 80% of the due value of the quarters, calculated based on average market prices of residential premises in the given town on the day of granting the benefit;

- housing allowance – received from social security authorities on the general terms and conditions.

Apart from that, professional soldiers who achieved outstanding results in their service could receive discretionary bonuses and allowances from the fund created annually by military units, in the amount of 9.5% of the emolument fund planned for the given year.

Regardless of the above, those soldiers who met the statutory criteria related to duration of service or health condition obtained the right to retirement and pension benefits and reconversion support after release from regular military service.

It should be noted that at that time various attempts were made at improving the level of emoluments of professional soldiers, in form of numerous motions filed to the President of the Republic of Poland and the Prime Minister. However, these motions did not receive the approval of the Ministry of Finance, which meant that they could not be executed.

The reasons for the lack of efficiency or determination of the management of the sector in striving to increase the multiplication factor of the base amount may be found, among others, in: the improper structure of the department, which was dominated by vegetative expenditures, instead of property expenses, which is mentioned annually in the evaluation of the execution of the State Budget. Apart from that, while implementing the objectives of the long-term *Programme of the Modernisation and Development of the Polish Armed Forces* and the *Integration with the North Atlantic Treaty Organisation*, it was assumed that the emoluments of soldiers would increase only after the completion of the so-called etatisation process (i.e. when the military rank of a professional soldier would become equivalent to a professional level of a position).

## **2. Emoluments of professional soldiers in Poland two decades later**

The amount of average emolument of professional soldiers is determined by the President of the Republic of Poland and it constitutes a multiplication of the base amount used to calculate remunerations in the public sector.

In 2021, the multiplication factor is 3.81 times the base amount (Ordinance, 2019) used to calculate these remunerations (starting from January 1 2020 the base amount is 1 614.69 PLN).

The average emolument of professional soldiers together with 1/12 of the annual bonus is PLN 6 154 (gross) and it is 3 309.50 PLN (i.e. 216.3%) higher than in 2001.

The lowest emolument, based on military rank, is paid to the soldiers in the private rank – private 4 110 PLN, private 1<sup>st</sup> class 4 180 PLN. The emolument of these soldiers increases with rank, so, for the following groups, it amounts to:

- regular non-commissioned officers – from 4 660 to 5 440 PLN
- warrant officers – from 5 090 to 5 530 PLN
- junior officers – from 5 670 to 6 230 PLN,
- senior officers – from 6 530 to 9 610 PLN.

Generals receive the emolument in the amount from 10 480 to 14 580 PLN. The highest base emolument is paid to the Chief of Staff of the Polish Army: 16 830 PLN.

However, the data presented above are only base remunerations, which do not include additional elements of the salaries of professional soldiers, i.e. various benefits added to the base emolument calculated with use of a specific index of the base amount.

For comparison, the average gross remuneration of employees in Q1 – Q3 of 2021 was:

- in the public sector – 5 615 PLN, which was higher by 3 447 PLN (i.e. by 254.4%);
- in the sector of enterprises – 5 852 PLN, which was higher by 3 676 PLN (i.e. by 276.8%);

than in the year 2001.

Currently, the emolument of professional soldiers consisted of two main elements:

- base emolument, according to military rank – taking into account the scope of performed tasks, degree of responsibility, and the required qualifications (group of emoluments);
- benefits.

Apart from the dominant base emolument, soldiers may receive the following benefits for performing regular military service (Ordinance, 2016):

- for the duration of service – in the following amounts:
  - o after 3 years of service - 3%,
  - o after 6 years of service - 6%,
  - o after 9 years of service - 9%,
  - o after 12 years of service - 12%,
  - o after 15 years of service - 15%,

- of the base emolument due. This benefit is increased by 1% of the due base emolument for each subsequent year of performed service over 15 years, however only to the maximum amount of 35% (after 35 years of military service);
- special benefit – granted for special properties or conditions of performing regular military service. Soldiers who meet the conditions that entitle them to receive several special bonuses are granted only one of them, at the highest monthly rate. On the other hand, soldiers who receive special benefits are not deprived of the right to receive other types of benefits, e.g. long-term service benefit.
- service benefit – granted to soldiers who perform service in specific management and command positions or in independent positions or in specific military units;
- incentive benefit – granted to soldiers who perform service at the corps of non-commissioned officers and privates, for:
  - o receiving at least a good mark in the service opinion,
  - o possessing a class of qualifications in a specialty adequate to the position held;
- function benefit, granted to soldiers who are entrusted with the following functions:
  - o a sole independent organ of a military university or its deputy,
  - o head of the organisational unit of such university or their deputy,
  - o at a research institute;
- compensation benefit – granted by the Minister of National Defence in particularly justified cases, to professional soldiers appointed for positions that are classified two or more position degrees higher. The amount is the difference between the base emolument due in the position held and the rate of the base emolument received in the previous position.

At the same time, these soldiers may also receive other financial benefits for the performed service, including:

- settling-in allowance – granted to soldiers who conclude the first contract for permanent service or second contract. This allowance is granted after taking the position, in the amount of 1 month's base emolument together with permanent benefits due to a soldier in the given position;
- additional annual emolument, in the amount of 1/12 of the annual base emolument together with permanent benefits;
- anniversary bonuses in the amount of:
  - o after 20 years of active military service – 75%,
  - o after 25 years of active military service – 100%,

- after 30 years of active military service – 150%,
- after 35 years of active military service – 200%,
- after 40 years of active military service – 300%,
- of the monthly base emolument together with permanent benefits. The period of service that entitles soldiers to receive this bonus includes periods of active military service and the periods of employment before appointment for regular military service;
- transfer allowance: soldiers who are relocated to a new place of performing service are entitled to:
  - daily allowance for the soldier and their family members,
  - lump-sum amount to cover the costs of transport of these persons to the new place of residence,
  - lump-sum relocation allowance,
  - settling-in allowance,
  - reimbursement of the costs of household equipment transport;
- holiday allowance, calculated taking into consideration the spouse and the children being dependants of the professional soldier. The amount this allowance per one person taken into account when calculating the allowance cannot be lower than 35 % of the lowest base emolument of a professional soldier;
- additional remuneration for the temporary entrustment with the performance of duties and for the performance of the entrusted tasks that extend beyond the scope of duties for the currently held position;
- remuneration for performing regular military service abroad – soldiers who are assigned to perform service outside the territory of the state, in positions in Polish military bases, international organisations, and international military structures receive:
  - the emolument and other financial benefits (e.g. additional annual emolument, discretionary bonus, holiday allowance) paid in Polish zloty and on the same terms and conditions as for soldiers who perform service in Poland,
  - foreign remuneration – paid in foreign currency,
  - adaptation allowance – paid once, in foreign currency,
  - right to accommodation/equivalent,
  - war benefit – for soldiers who perform duties in war zones.

On the other hand, in comparison to the year 2001, significant changes have been introduced to the housing benefits for professional soldiers (Act., 1995).

From the day of assignment of the first position to the day of release from active military service, professional soldiers are entitled to receive accommodation for the period of performing military service, in the town where they perform service, in the vicinity, or, upon consent of the soldier, in another location.

The right to accommodation is granted in one of the following forms:

- assignment of accommodation or other residential premises;
- assignment of accommodation at a boarding house or boarding house premises;
- payment of housing benefit.

On the other hand, soldiers who perform contract service may apply for the payment of housing benefit only if it is impossible to assign them to lodging or other residential premises. Such soldiers, who wish to exercise their right to accommodation, may apply to the Military Property Agency to be assigned lodging or other residential premises. If there is a possibility, the Agency offers the soldier the assignment of lodging or other residential premises. Soldiers who refuse to accept the offered lodging or other residential premises lose their right to accommodation, including the right to receive housing benefit, on the date of the statement, for the whole period of holding the position, unless their rights to accommodation change.

If the soldier is not assigned lodging or other residential premises, contract service soldiers may file a motion for the payment of housing benefit or for the assignment of a place at the boarding house or boarding room.

On the other hand, permanent service soldiers may choose to receive the payment of housing benefit as one of the 3 forms of their right of accommodation. Such soldiers may choose the form of the right to accommodation according to their needs and at their own discretion.

On the other hand, housing benefits are not granted to professional soldiers who:

- have been transferred to the reserve and do not perform professional duties;
- have been transferred to be at the disposal and released from performing professional duties;
- receive separation allowance and reimbursement of the costs of transport (...), the reimbursement of the costs of daily transport from the place of residence to the place of performing military service and back;
- have been assigned to perform military service outside the territory of the state, who exercise the right to free accommodation in residential premises or the financial equivalent to rent residential premises.

Regardless of the above, those soldiers who met the statutory criteria related to duration of service or health condition obtained the right to retirement and pension benefits and reconversion support after release from regular military service.

### **3. The social and living conditions of professional soldiers in Poland**

The social and living situation is the main condition for the proper functioning of employees, police officers, and professional soldiers and, at the same time, one of the risk factors for disturbances in their well-being and the lives of their families.

The main definition used in the research on the social and living conditions is the definition of the term “household” (Metodyka GUS, 1999). A household is a group of related or unrelated persons who live together and sustain themselves together (a multi-person household) or a person who sustains himself or herself independently, regardless of whether they live alone or with others, although without combining their incomes (a single-person household).

A factor that is important for the evaluation of these conditions is the household budget and a systematic presentation of incomes and expenditures, focusing mainly on the expenses of the household in the given period. Financial revenues include the incomes received by members of the household (or by the whole household), while financial expenditures include the expenses on food, housing, utility payments for electricity, gas, and water supply, as well as any other forms of payment. Such expenditures also include personal income tax advance payments as well as health insurance, pension and retirement contributions, etc.

The household budget constitutes the basis for determining the disposable income, which is calculated as the sum of the current income of the household from specific sources minus the personal income tax advance payments. Such revenues include financial and non-financial income as well as goods and services received free of charge. The disposable income is allocated mainly to expenditures and increasing savings.

The disposable income of a major part of the Polish society, including professional soldiers, consists mainly of the income from paid employment (Kurzanowski A., 2002, p. 114-116) that includes all types of income received in return for work, such as:

- remuneration (emolument) for work (or service);
- sickness benefit (received during the period of employment), compensation and childcare benefits;



- non-financial income (paid by the employer) e.g. the value of services connected with using company accommodation, company car for private purposes, subsidies for holiday stays and summer camps and subsidies on public transport tickets;
- amounts received from the social and housing fund.

Thus, the income from paid employment includes all types of income obtained from all workplaces of the given household member, regardless of the duration of the employment and the period of the employment contract.

The financial situation of professional soldiers and their families, as that of any other professional group, is influenced by numerous factors, both internal and external ones. As a result, the following policies and systems, both past and future ones, are important:

- the general economic policy of the state;
- the family support policy;
- the existing legal, remuneration, and taxation systems;
- the possibilities of the State Budget.

Obviously, solutions applied in the sector with respect to the system of financial and non-financial benefits to which soldiers are entitled in return for performing regular military service and that influence the financial situation of soldiers and their families are also important.

The overall economic condition of the state has a major influence on shaping a specific financial situation of the society, and of individual social classes and professional groups, including professional soldiers.

Similarly to all employed workers, these soldiers have the right to expect the state (the army) to satisfy their social and existential needs on the desired level and in form of various considerations, both financial and non-financial ones, in return for performing their professional duties.

#### **4. The assessment of the social and living conditions of professional soldiers at the beginning of the century**

At the beginning of the 21<sup>st</sup> century, the Armed Forces of the Republic of Poland noted an increasing number of negative sentiments expressed by professional soldiers, mainly as a result of the deteriorating social and living conditions, which, in turn, resulted in lowering their social position and the reputation of their profession in the society.

These opinions were confirmed by studies conducted in the army, on: *“The social and living conditions in the households of professional soldiers of the Polish Army and employees*

*of the military forces*” (Military Office for Sociological Studies, 2001), which demonstrated that approximately  $\frac{3}{4}$  of all professional soldiers expressed negative opinions about this situation.

The situation resulted mainly from the restructuring of the national economy, which created different working and living conditions for all social and professional groups, including professional soldiers. One of the visible results of the transformation was the polarisation of the living conditions in the population, with an accumulation of wealth on one end of the spectrum and the spreading of poverty on the other.

In comparison with the social and living conditions of professional soldiers in the main NATO member states, this situation looked even worse, which contributed to the frustration of Polish soldiers. This was particularly noticeable during the joint realisation of professional tasks, exercises, and trainings, as well as during performing service in peace missions.

The deterioration of the overall financial situation of these soldiers was also largely influenced by the fact that they were deprived of numerous previously granted rights that resulted from the specificity of a job performed in special conditions that involved risking their lives, at the same time with high health-related requirements and strict rules of discipline and readiness at disposal. These rights included the right to free medication, cheaper public transport tickets (for PKP trains and PKS coaches) or the end of transferring subsidies to canteens and subsidising rents in permanent lodging, or the growing fees for the accommodation of single soldiers at boarding houses.

At the same time, similar solutions were widely available for soldiers and members of their families in the main NATO member states, with respect to subsidising holidays, the purchase of specific goods and services in exchange stores, boarding and accommodation. Obviously, the scope of these benefits varied depending on the member state.

It should also be noted that the difficulties resulting from performing regular military service significantly reduced the possibilities of the soldiers to improve their financial situation by taking other forms of paid employment.

Thus, the overall financial situation of families of professional soldiers was determined mainly by:

- the level of the soldiers' emoluments;
- the type of military unit or armed forces where they performed military service;
- the place of performing service;
- the social situation of the family;
- the professional activity of other members of the soldiers' families.

The conducted research on *“The financial situation of professional soldiers and army employees and their families”* (Department of Social Affairs and Reconversion, 2002) also confirmed that 54% of all families of professional soldiers had only one source of income, which was the soldier’s emolument. 41% of the families were also supported by the incomes of soldiers’ spouses, and 5% by income of other household members of income from additional employment of the soldier.

The economic situation of families of professional soldiers is reflected more precisely by the index of the average disposable income per one household member. This index varied significantly among soldiers’ households: approximately 3.0% of households had a net monthly disposable income per household member in the amount lower than 350 PLN (i.e. on the level similar the threshold of the existential minimum as determined by the Institute of Labour and Social Policy), followed by 10.0% with a disposable income up to 475 PLN, and 11.4% below 600 PLN. At the same time, 40.6% of these households had a disposable income up to 800 PLN and in nearly 35% households this income exceeded 800 PLN per household member.

This overall view of the structure of households varied significantly depending on independent variables, namely the membership of respondents in corps, their education, age, social and professional situation of their spouses, and the number of dependent children.

The correlation analysis presented in the study demonstrated that the factors listed above influenced the situation in the following ways:

- the higher was the corps to which the respondents belonged, the more often they declared that the average income in their families exceeded 800 PLN (24.7 of regular non-commissioned officers, 38.9% of warrant officers, 49.3% junior officers, and 75.0% senior officers);
- the higher was the level of the general education of respondents, the less often they declared an average income below 600 PLN (40.7% in the group of respondents without a secondary education degree, 23.6% of the respondents with a secondary education degree, 14.7% of undergraduates, and 11.1% of university graduates);
- older respondents less often declared an income lower than 600 PLN (under 49 years of age – 61.2%, 50 – 59 years – 30.5%, 50 – 65 years – 20.0% and 66 years and older - 11%);
- the social and professional situation of the respondent’s spouse had a significant influence on the amount of average income. In households where the spouse did not work and did not receive other income (benefits), the average income was more often

below 600 PLN than in other households.

In comparison, the percentage of household members in Poland who lived on the threshold of the existential minimum was significantly higher and amounted to approx. 16.5%. In terms of socio-economic groups, it ranged from 8.2% (self-employed persons) to 21.7% (pensioners). The percentage of such persons among workers was 12.4% and 9.6% among retired persons. This allows us to draw the general conclusion that the overall social and living (material) situation of households of professional soldiers in terms of the amount of average income per family member was varied and depended on numerous factors.

Although the situation in households of those professional soldiers whose spouses received income was much better, according to these soldiers, the professional activity of their spouses was decreasing with time. This resulted mainly from the increase in unemployment, as one fifth of professional soldiers performed service in small garrisons located far from urban agglomerations, in areas described by the Council of Ministers as being at risk of particularly high unemployment. The worst situation was noted in small garrisons, where only 30% of the wives of professional soldiers had jobs.

Young people from the soldiers' families were also unemployed. According to the cited studies, nearly every fourth family of professional soldiers had a young member registered as unemployed. Apart from the amount of financial income, another important factor that determines the social and living conditions is the state of savings and debt. Unfortunately, it was difficult, and in some cases even impossible, to determine the amount of debt and, even more, savings, in the households of professional soldiers.

However, the research revealed that 80% of the households were indebted and that over 85% did not have any savings. As far as debts are concerned, for example, as of the 31<sup>st</sup> of December 2001, more than 12.3 thousand professional soldiers had overdue payments for rent to the Military Housing Agency, in the total amount of approx. 8.2 million PLN, which means an average amount of approx. 665 PLN.

Another indicator of the financial situation of households may be their property and ownership of durable-use goods. The quantity and quality of such goods being at the disposal of the given household may indicate material wealth and the living standard.

The research demonstrated that some types of equipment were commonly used: TV sets, radios, electric vacuum cleaners, and washing machines. However, one should note the quite low share of households that possessed more modern appliances, such as audio and video equipment, satellite TV (20.3%), modern kitchen appliances, computers (21.5%),

electric sewing machines (28.5%), and freezers (31%). The percentage of households that possessed new passenger cars was also low.

Based on the presented indicators and the opinions expressed by professional soldiers in the survey, one may conclude that their assessment of their financial situation was quite poor. It is likely that this was also influenced by such factors as the powerlessness of military authorities in solving housing and healthcare problems (difficulties in using certain forms of medical help led to the necessity to use private healthcare services and thus to a lower level of buying prescription drugs).

The living standards of soldiers and their families may also be proven by the way of spending holidays. Research revealed that nearly half of these families had not left their homes and over 10% took up other jobs during holiday leave. If they travelled, it was usually to visit their families. Only 15% went on package holidays, while only one in fifty families could afford a trip abroad (2.2%).

Moreover, a vast majority of soldiers' children did not benefit from organised forms of summer holidays. Few parents (12.4%) sent their children to summer camps, and even fewer to youth camps (7.5%).

In general, it should be noted that, in the opinion of a majority of the surveyed professional soldiers the scope of benefits and social support in the army was highly insufficient considering their complex financial situation.

According to the respondents, the scope of support should be extended, in particular for soldiers from liquidated military units (garrisons) and those who have not acquired the right to full military retirement yet. This was particularly important considering the age of professional soldiers who were leaving the service at that time, which was a little over 41 years.

Although these soldiers enjoyed specific rights in the event of being released from military service (severance pay, equivalent for unused holiday leave, 12 months' emolument instead of retirement) but, in their opinion, these benefits had already been significantly depreciated. This resulted mainly from the fact that they had been introduced in the period when soldiers who left military service did so mainly because they had reached the age that is considered reasonable in the light of military pragmatics.

## **5. The evaluation of the social and living conditions of professional soldiers two decades later**

The Author evaluated the social and living conditions of professional soldiers based on the study entitled *“The financial situation of professional soldiers”* (Military Office for Social Studies, 2018).

According to this study, the households of professional soldiers most often consist of four persons (31%) or three people (28%). Only 9% of the households are composed of five and more persons. Two-person households account for 19%, and one-person households for 13%. These are most often couples or relationships – 80%, 56% of whom have children, usually one or two. Every fifth professional soldier declared that their household benefits from the 500 PLUS programme (this benefit is introduced on July 1 2019 and is granted for every child under the age of 18).

The income of a professional soldier’s household is usually generated by two persons (60%). In 34% of them the family budget is generated by the income of one person and it is only the emolument of the soldier. In over one fifth of the households there are unemployed adults (21% of the respondents). Usually, one person is unemployed – 18%, much less often two – 2% or three – 1%.

The study revealed that the average income in all professional soldiers’ households amounted to 4 774 PLN. The average income per one household member was 1 806 PLN.

The average total net income in soldiers’ households, according to the corps to which the respondents belonged, was: for regular privates 4 614 PLN for the whole household, for non-commissioned officers 4 640 PLN, for junior officers 5 479 PLN, and for senior officers 7 473 PLN.

This income per one household member was, respectively: for regular privates 1 655 PLN, for non-commissioned officers 1 826 PLN, for junior officers 2 192 PLN, and for senior officers 3 379 PLN. Considering the number of household members, the average net income per person was: 3 729 PLN in one-person households, 2 370 PLN in two-person households, 1 645 PLN in three-person households, and 1 278 PLN in four-person households. In this study, 60% of the professional soldiers declared that they economised or maintained a household that could afford everything necessary but without the possibility to save money. Only 28% of the respondents stated that they could manage a household without making sacrifices.

At the same time, those respondents assessed the social and living conditions in their household as follows: 18% of them considered that their situation was “good”, 35% “quite

good”, 35% declared that their situation was “neither good nor bad”, and 12% did not have an opinion.

The comparison of the current social and living situation (living standard) of households of professional soldiers with that of the year 2001 revealed that the number of soldiers who stated that their situation is “bad” or “has deteriorated” has generally decreased (a decline from 56% to 35%).

The research also demonstrated that the share of soldiers who had debts in form of loans has diminished (from 85% to 66%) and the percentage of soldiers who have savings has increased (from 15% to 44%). At the same time, 47% of the respondents stated that in the preceding year they had to give up going on holiday or trip for adult household members (in 2001 this was the situation in 85% households). As for respondents who have children, 37% of them decided not to go on family holidays (together with children under 18) and 28% gave up sending children on holiday camps or other organised group holidays (in 2001, these groups accounted for, respectively, 83.6% and 93.5%).

At the same time it is worth noting that the presented research of the Military Office for Social Studies did not take into account the significant increase in the emoluments of professional soldiers that was introduced on January 1 2020. The emoluments of these soldiers, increased, on average, by:

- 460 PLN in the corps of regular privates,
- from 510 to 540 PLN for non-commissioned officers,
- from 530 to 550 PLN for warrant officers,
- from 570 to 620 PLN for junior officers,
- from 500 to 660 PLN for senior officers, and
- 670 for generals.

After taking this increase into account, it will doubtlessly turn out that the social and living conditions of professional soldiers have further improved, which will likely be reflected in the subsequent assessment of their situation.

## **Conclusion**

The economic conditions and the social policy of the State addressed to professional soldiers as a professional group had and still have a direct (or indirect) influence on the past and present social and living conditions of professional soldiers. Thus, the author focused on determining the position of the social and living situation of professional soldiers in the economic policy of the State, and, in particular, on specifying the extent to which specific

objectives of this policy have been realised in a manner different than commonly applied, the reasons for such situation, and the resulting benefits for professional soldiers, and, as a consequence, on their actual social and living conditions.

At the same time, it was assumed that, in order to present a full overview of the situation, it is necessary to present it in two main periods i.e. for soldiers who performed regular service at the beginning of this century and those who performed it nearly two decades later (in 2018). When evaluating the social and living conditions of professional soldiers 20 years ago and now, it should be noted that:

- it is characterised by significant differences in the average income per one member of the household;
- the main factors that determine the amount of the average income in the households of professional soldiers are the total income and the number of family members. As a result, larger families of soldiers, with the lowest amounts of disposable income, have the worst material conditions. This applies mainly to regular non-commissioned officers, warrant officers, and officers who have larger families;
- the social and living conditions of professional soldiers, measured with the objective indicator of monthly income per soldier's family member are not very poor, as a large number of professional soldiers have a medium, even if modest, living standard;
- a large group of these soldiers have not achieved an optimum housing arrangement yet and, in consequence, they bear higher sustenance costs resulting from living in two homes;
- the restructuring of the Polish Armed Forces which took place both twenty years ago and now requires taking a different approach to the need to introduce legal regulations that would secure the social and living conditions, especially of soldiers who are released from regular military service, but have not acquired the right to retirement yet as well as those who have the right to part of the retirement only;
- the subjective opinions of the surveyed professional soldiers on their social and living conditions, including the income per family member and the lifestyle (both in 2001 and in 2018) are much more negative than in national public opinion surveys. On the other hand, it should be noted that they do not differ significantly from the average living standards of the Polish society.



## References

- Chyrzyński, R. (2018) 'Determinanty systemu uposażeń żołnierzy', [in:] Stańczyk, K., Chyrzyński, R. (ed.) *Dylematy współczesnej obronności i bezpieczeństwa państwa. Aspekty ekonomiczno-społeczne*, Wyd. Adam Marszałek.
- Danecki, J. (1996) 'Kwestie społeczne - istota, źródła, zarys diagnozy', [in:] „*Polityka społeczna*”, Wydawnictwo INTERART.
- GUS (1999) *Metodyka badania budżetów gospodarstw domowych*, GUS, Warsaw.
- Kurzynowski, A. (2002) 'Polityka społeczna', Szkoła Główna Handlowa, Instytut Gospodarstwa Społecznego, Warsaw.
- Słownik języka polskiego* (1988), vol. III, PWN, Warsaw.

## Legislation:

- Act of June 30 1970 on the Military Service of Professional Soldiers (Journal of Laws. 199, No. 10, item 55, incl. further amendments).
- Act of December 17 1974 *on the Emolument of Soldiers* (Journal of Laws of 1992, No. 5, item 18, incl. further amendments).
- Act of 10 December 1993 *on pension provision for professional soldiers and their families* (consolidated text: Journal of Laws of 2002 No. 10, item 108).
- Act of June 22 1995 *on the quartering of the Armed Forces of the Republic of Poland* (Journal of Laws of 2016, item 185, Journal of Laws of 2017, item 218).
- Act of 17 December 1998 *on Old-Age and Disability Pensions from the Social Insurance Fund* (Journal of Laws of 1998 No. 162, item 1118).
- Budget Act for the year 2001* of March 1 2001 (Journal of Laws of 2001 No. 21, item 246).
- Act of May 25 2001 on the Reconstruction, and Technical Modernization, and Financing of the Polish Armed Forces in the years 2001 – 2006 (Journal of Laws. 2001, No. 76, item 804, incl. further amendments).
- Ordinance of the President of the Republic of Poland of October 8 2019 *on the determination of the base amount constituting the average emolument of professional soldiers* (Journal of Laws item 1991).
- Ordinance of the Minister of National Defence of October 10 2000 *on benefits to the emoluments of soldiers* (Journal of Laws No. 90, item 1005).
- Ordinance of the Minister of National Defence of February 21 2001 *amending the Ordinance on base emolument according to position* (Journal of Laws No. 23, item 276).
- Ordinance of the Minister of National Defence of March 15 2001 *amending the Ordinance on base emolument according to position*.
- Ordinance of the Minister of National Defence of December 28 2016 *on benefits to the base emolument of professional soldiers* (Journal of Laws of 2016, item 2296).
- Ordinance of the President of the Republic of Poland of October 8 2019 *on the determination of the base amount constituting the average emolument of professional soldiers* (Journal of Laws item 1991).

Ordinance of the Minister of National Defence of February 25 2020 *amending the Ordinance on benefits to the base emolument of professional soldiers* (Journal of Laws, item 372).

Ordinance of the Minister of National Defence of March 31 2020 *on the emolument rates of professional soldiers* (Journal of Laws, item 582).

#### **Other sources**

Research on “*The financial situation of professional soldiers*” Military Office of Sociological Studies, Warsaw 2001 – unpublished.

Research on “The financial situation of professional soldiers and army employees and their families”, Department for Social Affairs and Reconversion of the Ministry of National Defence, Warsaw 2002 Research on “The financial situation of professional soldiers”, Military Office of Social Studies, Warsaw 2018

<https://wynagrodzenia.pl/gus/dane-miesieczne> (access of May 31 2021).

<http://promilitaria21.home.pl/autoinstalator/joomla/aktualnosci-i-prawo/item/8374-2-xi-pograsza-sie-sytuacja-materialna-zolnierzy-i-co-z-niej> (access of May 30 2021).