

OECD-SOCR metadata on income replacement programmes - Poland

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INTRODUCTION

This note includes a comprehensive list of the social programmes included in the SOCR database, accessible via OECD.Stat [<http://stats.oecd.org/Index.aspx?DataSetCode=SOCR>].

Based on information collected in five rounds of the SOCR questionnaire, the database distinguishes between priority and optional programmes. Priority programmes have the following characteristics:

- They are main income replacement benefits, meaning they are not supplements but are typically received in their own right, independently of other benefits; and
- Their volume is significant or highly variable:
 - programmes with a significant number of recipients or expenditure (regardless whether open to new recipients or not); or
 - programmes open to new recipients that are highly sensitive to economic or social conditions.

All other programmes are considered as optional. For instance, very small programmes that are being phased out, as are benefit “top-ups” of unemployment benefits or pensions.

Priority programmes are made publicly available through OECD.Stat, optional programmes are not published. Programmes are organised by social protection branch (e.g. ‘OLD AGE’) and sub-branch (e.g. ‘Pensions’) under the form of programme tables. The aim of them is to include essential information needed by users to identify the benefit and to know methodological details that may be relevant for a correct interpretation of recipients figures.

Data sources of local administrations. Web links to official administrative databases and reports are provided when the sources are publicly available. These web pages are subject to changes by local administrations, which implies that in the future some links may not work.

Other OECD sources of qualitative information on social benefits: [Country policy descriptions](#).

Other OECD sources of information on social protection: [Social Expenditure \(SOCX\)](#), [Tax-Benefit model \(TaxBEN\)](#), [Family database](#), [Pensions at a Glance](#).

OLD AGE

Pensions

4 programmes reported

Programme Name [English]	Old age Pensions' (closed) Fund (old rules)
Programme Name [Original]	Fundusz Emerytalny (stare zasady)
Means-tested	No
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	Fund closed in 2009. Includes miners.
Source	ZUS-Social Insurance Institution, statistical portal

Programme Name [English]	Old age Pensions' new fund (new rules)
Programme Name [Original]	Fundusz Emerytalny (nowe zasady)
Means-tested	No
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	Program started in 2009. The first partial pension granted from 1 January 2014.
Source	ZUS-Social Insurance Institution, statistical portal

Programme Name [English]	Individual Farmers' Social Insurance – retirement
Programme Name [Original]	Emerytura - Kasa Rolniczego Ubezpieczenia Społecznego
Means-tested	No
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	
Source	GUS-Central Statistical Office of Poland, annual report

Programme Name [English]	Uniformed services – retirement
Programme Name [Original]	Emerytura służb mundurowych
Means-tested	No
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	
Source	GUS-Central Statistical Office of Poland, annual report

Early (Anticipated) retirement

3 programmes reported

Programme Name [English]	Old age Pensions' (closed) Fund: Anticipated old age pension
Programme Name [Original]	Wcześniejsza emerytura
Means-tested	No
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	Fund closed in 2009. Includes miners.
Source	ESSPROS pension database

Programme Name [English]	New Pension Fund: Bridging Pension
Programme Name [Original]	Emerytura pomostowa
Means-tested	No
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	Payment began in 2009.
Source	ZUS-Social Insurance

Programme Name [English]	Early retirement - Disability Fund
Programme Name [Original]	Wcześniejsza emerytura - fundusz inwalidzki
Means-tested	No
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	Includes miners.
Source	ESSPROS pension database

SURVIVORS

Survivor Pensions

4 programmes reported

Programme Name [English]	Disability Fund - Survivors pension
Programme Name [Original]	Fundusz Rentowy - Renta rodzinna (Survivors pension)
Means-tested	No
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	Includes miners.
Source	GUS-Central Statistical Office of Poland, annual report

Programme Name [English]	Work Injury Fund - Accidental survivors' pension
Programme Name [Original]	Fundusz wypadkowy - Renta rodzinna wypadkowa (Accidental Survivors Pension)
Means-tested	No
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	
Source	ZUS-Social Insurance

Programme Name [English]	Individual Farmers' Social Insurance - Survivors' pension
Programme Name [Original]	Kasa Rolniczego Ubezpieczenia Społecznego - Renta rodzinna (Survivors pension)
Means-tested	No
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	
Source	KRUS-Agricultural Social Insurance Fund, public information bulletin

Programme Name [English]	Uniformed services - Survivors' pension
Programme Name [Original]	Ubezpieczenie społeczne służb mundurowych - Renta rodzinna (Survivors' pension)
Means-tested	No
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	
Source	GUS-Central Statistical Office of Poland, annual report

INCAPACITY

Disability Pensions

4 programmes reported

Programme Name [English]	Disability Pensions - Disability Fund
Programme Name [Original]	Fundusz Rentowy
Means-tested	No
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	Includes miners
Source	ZUS-Social Insurance Institution, statistical portal and GUS-Central Statistical Office of Poland, annual report

Programme Name [English]	Disability Pensions-Individual Farmers' Social Insurance
Programme Name [Original]	Renta z tytułu niezdolności do pracy - Kasa Rolniczego Ubezpieczenia Społecznego
Means-tested	No
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	
Source	GUS-Central Statistical Office of Poland, annual report

Programme Name [English]	Disability Pensions - Uniformed services
Programme Name [Original]	Ubezpieczenie społeczne służb mundurowych - renta z tytułu niezdolności do pracy
Means-tested	No
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	
Source	GUS-Central Statistical Office of Poland, annual report

Programme Name [English]	Social Pensions
Programme Name [Original]	Renta socjalna
Means-tested	Yes
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	
Source	ZUS-Social Insurance Institution, statistical portal

Pensions (Occupational injury and Disease)

2 programmes reported

Programme Name [English]	Disability Pensions - Accident Disability Pension
Programme Name [Original]	Renty z tytułu niezdolności do pracy wypadkowe
Means-tested	No
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	
Source	ZUS-Social Insurance Institution, statistical portal

Programme Name [English]	Sickness Allowances from Social Insurance Fund
Programme Name [Original]	Zasiłek chorobowy z FUS
Means-tested	No
Reporting unit for annual caseloads	Full-year equivalent
Other remarks	
Source	ZUS-Social Insurance Institution, statistical portal

Paid Sick Leave

2 programmes reported

Programme Name [English]	Sickness Absence (Social Insurance Institution)
Programme Name [Original]	Absencja chorobowa ZUS
Means-tested	No
Reporting unit for annual caseloads	Full-year equivalent
Other remarks	
Source	ZUS-Social Insurance Institution, statistical portal

Programme Name [English]	Sickness Absence - Farmers' Social Insurance
Programme Name [Original]	Absencja chorobowa - Kasa Rolniczego Ubezpieczenia Społecznego (KRUS)
Means-tested	No
Reporting unit for annual caseloads	Full-year equivalent
Other remarks	
Source	KRUS-Agricultural Social Insurance Fund, report

FAMILY

Maternity and Parental Leave

1 programme reported

Programme Name [English]	Family Benefits - Maternity allowance
Programme Name [Original]	Zasiłek macierzyński
Means-tested	No
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	
Source	ZUS-Social Insurance Institution, statistical portal

UNEMPLOYMENT

Unemployment Compensations

1 programme reported

Programme Name [English]	Employment and counteracting unemployment - Full unemployment benefit
Programme Name [Original]	Zatrudnienie i przeciwdziałanie bezrobociu - Zasiłek dla bezrobotnych
Means-tested	No
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	
Source	Ministry of Family, Labour and Social Policy, statistics and analysis

Early retirement for labour market reasons

3 programmes reported

Programme Name [English]	Employment and counteracting unemployment - Pre-retirement allowance
Programme Name [Original]	Zatrudnienie i przeciwdziałanie bezrobociu - Zasiłek przedemerytalny
Means-tested	No
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	
Source	ZUS-Social Insurance Institution, statistical portal

Programme Name [English]	Pre-Retirement Benefit
Programme Name [Original]	Świadczenie przedemerytalne
Means-tested	No
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	
Source	ZUS-Social Insurance Institution, statistical portal

Programme Name [English]	Early retirement because of the the labor market situation - Pension Fund
Programme Name [Original]	
Means-tested	No
Reporting unit for annual caseloads	Individual recipients, average or point-in-time
Other remarks	
Source	

OTHER SOCIAL

Income Maintenance

2 programmes reported

Programme Name [English]	Social Assistance - Temporary social assistance allowance
Programme Name [Original]	Pomoc społeczna - Zasiłek okresowy
Means-tested	Yes
Reporting unit for annual caseloads	Individuals living in households, total over the year
Other remarks	
Source	Ministry of Family, Labour and Social Policy, social assistance statistics

Programme Name [English]	Social Assistance - Meal
Programme Name [Original]	Pomoc społeczna - posiłek
Means-tested	Yes
Reporting unit for annual caseloads	Individual recipients, total over the year
Other remarks	
Source	Ministry of Family, Labour and Social Policy, social assistance statistics

HOUSING

Housing Benefits

1 programme reported

Programme Name [English]	Housing Allowances
Programme Name [Original]	Dodatki mieszkaniowe
Means-tested	Yes
Reporting unit for annual caseloads	
Other remarks	No data available
Source	