

The Regional Diversity of Poverty and of Local Self-government Expenditure on Social Assistance in Poland in Terms of Budgetary Restrictions

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Abstract

Poland is characterized by relatively high unemployment and a large proportion of people living on a shoestring, and even very poorly. These phenomena occur with varying intensity in individual units of local self-government and affect both the expenditure on social assistance and the revenue of the entity which are related with local economic base and which are strongly differentiated across the country. Although most of self-government's tasks in the field of social assistance are their own tasks and some of them are made mandatory, while some on a facultative basis, according to the research, there is no unambiguous correlation between the wealth of self-government units operating in the province and their expenditure for social assistance and policy. The level of this kind of expenditure is strongly related with the scale of unemployment and poverty. Such a regularity indicates that the transfers from the state budget play important role in financing local governments tasks in the field of social assistance and policy.

Key words: local self-government expenditure, social assistance, poverty

JEL Classification: H72, H75, H53

1 Introduction

Poland is characterized by relatively high unemployment and a large proportion of people living very poorly. These phenomena occur with varying intensity in individual self-governments and affect the revenue of the entity which are related with local economic base and which are strongly differentiated across the country. According to the system solutions adopted in Poland in the field of social assistance, most of the significant tasks related to social assistance are performed by the local self-government units as their own tasks, including those made compulsory and on facultative basis. It should be emphasised that self-governments were not provided with adequate resources to fully and correctly complete the duties. In a situation where the income level of local governments in the state is highly diversified and is only partially compensated by transfers from the state budget, there is a risk that the needy people will be deprived of help or will obtain it only in a narrow range. The more freedom the local governments have in deciding whether, how and how much help to provide, the greater the risk that it will limit the expenditure in this area, especially when they lack the resources for other important tasks. A similar negative result might occur if the demand for social services in the area is high and, consequently, support for a specific person small. The aim of the article is therefore investigating how the level of expenditure on aid and social

policies borne by the local government in different parts of Poland is formed and how it is related to the scale of poverty in the population living there and the richness of the local government. The results of such researches have crucial meaning and should be always considered in the process of designing the system of provision and financing social assistance in different countries.

In Poland, the deeper scientific researches on the issue of the disparities of social assistance expenditure of the local self-government have not been conducted yet. But the issue of diversity of local expenses in this field and its determinants was considered on the example of Norwegian municipalities (Lien and Pettersen, 2004). As the sectorial approaches to social exclusion proved to be ineffective we could observe redefining social policies at the local level eg. in Italy but also in many other countries (Bifulco, Bricocoli and Monteleone, 2008; Wollmann, 2004). But Bifulco, Bricocoli and Monteleone (2008) also emphasize that decentralization of social policy may have negative effect on social entitlements and some redistributive mechanisms may be provided only on the national level. They underline the problem of resources for financing this type of tasks on the local level of governance. According to Smokes (2001) the lack of balance between revenue sources (including transfers) and the increases in service functions assigned to them are the major constraints of further expansion of local services. Researches that focus on providing social assistance by the local self-government confirm that the more autonomous in conducting social policy the local authorities are the more social services and benefits differ across the country and that their decisions are determined by a wide range of factors dependent and independent from local self-government (e.g. Rauch 2008, Hamnett, 2009; Craw, 2010).

2 The Methodology of the Research

In order to investigate the relationship between the self-government's spending on assistance and social policy and the needs of local communities to benefit in this regard and the financial possibilities of individual self-governments and its debt the analysis included data describing 16 Polish provinces. In order to specify the level of needs of the society two coefficients were used – the range of statutory poverty in a province and the factor affecting it most – the unemployment. The data referring to poverty in Poland are collected only on the level of provinces. There are no comprehensive information depicting the rate of this phenomenon on lower levels of the territorial division in the whole country, and this determines the method of conducting the analysis and the details of discussion. The volume of local government spending on assistance and social policy is the sum of the expenditure incurred by all entities located in the province such as municipalities, districts, cities with district rights and the province as a unit of local self-government, and to ensure comparability of data across the country divided by the number of inhabitants of the province (in Poland there are 2479 municipalities, 379 districts including 65 cities with district rights and 16 self-governing provinces). The level of self-government's resourcefulness was also assessed per capita into account being taken two factors: income (including, among others, transfers from the state budget subsidy, i.e. the overall alignment lower than the national average income level of the individual and grants transferred for a specific purpose) and much more diverse in the case of individual units own revenues of local government which are the main source of funding for their own tasks. The analysis also included the expenditures allocated by the self-governments in the particular provinces to: 1) benefits whose grant and height depends on the competent authority of the self-government but

essentially their implementation falls within the scope of mandatory tasks of self-government, 2) benefits, which are financed by the government on a facultative basis. The research was based on the data collected in 2012 which are obligatorily sent by all units of local self-government in the country and stored by public institutions – Ministry of Finance, Ministry of Labour and Social Policy and on the Central Statistical Office data.

3 The Issue of Poverty and its Determinants in Poland

It is often claimed in Poland that the previously existing political system, i.e. socialism, led to developing demanding attitudes in the society being used to care provided by the state, excessive expectations regarding the accountability of public authorities for the social security of the citizens, their helplessness and poor activity in independent overcoming of life's difficulties. Taking the state of public finances and the rate of growth of public debt in Poland into account, some economists and politicians express the view of the need for introducing changes and reducing social expenditure. The problems arising from the imperfections of the social assistance system in Poland and addressing it, in many cases, to wrong people, are also pointed out. The analysis of the level of expenditure on social assistance of the general government sector in 2011 shows that the investment in this area in Poland constituting 15.9% of GDP significantly deviate from the average specific for the countries of the European Union (EU-27), which is 19.6% of GDP, not mentioning the countries of the Eurozone where it amounts to 20.2% of GDP. What is more, the share of this type of expenditure in GDP shows a downward trend and a vital part of it is constituted by the retirement benefits (9.4% of GDP), while for the support for families and children only 1.3% of GDP is spent, for the sick and disabled – 2.7% of GDP, and for the unemployed 0.9% of GDP (Eurostat, 2014).

Social security coverage is guaranteed in the Constitution of the Republic of Poland (Poland's Journal of Laws, 1997, No 97, item 483). According to its provisions every citizen is entitled to it in the case of being unable to work due to disability, illness, and after reaching the retirement age, and also when he or she is involuntarily deprived of a job and has no other means of subsistence. Special protection is granted to people with disabilities, to which the public authorities have a duty to provide assistance in securing existence, social adoption and social communication. Meanwhile, a large part of the society are people living in modest or even very poor conditions. Traditionally the phenomenon of poverty in Poland is connected with the process of system transformation. However, it had existed earlier, before the initiation of social and economic changes, and its range had been assessed for 6% (The World Bank, 1994). The problem of poverty has undoubtedly intensified in the beginning of the 90's and is treated as the social cost of the undergone transformations (Baczewski, 2008). Until 2005 the range of poverty has been gradually expanding, although in some years the percentage of the affected people increased only slightly. In turn, during 2005-2008 the financial situation of the Polish society had been gradually improving and the indicator of poverty risk (calculated as the proportion of the number of people with equivalent disposable income, which is 60% of the national median equivalised disposable income after social transfers) had been gradually reduced from 20.5% in 2005 to 16.9% in 2008. This favourable change coincided with the Polish accession to the European Union, the increase in investment and economic conditions and, consequently, a decrease in unemployment. At that time, there was also an emigration of Poles abroad on an unprecedented scale – 135 thousand people had permanently left the country. According to the

data taking into account the status from the end of 2007 the number of emigrants temporarily staying outside Poland exceeds 2 million people. The majority of them, i.e. 73%, as the reason for their leave declared looking for a job, 16% - mentioned family problems, and only 5.5% left the country to take up education.

In the years 2009-2012 the risk of poverty in Poland has been gradually increasing. At the end of 2011 its indicator was already as high as 17.7%. In the closer analysis of the problem of poverty the data for the year 2012 will be analyzed, when (for the second time in a row) a decrease in the real value of household income by 0.2% and decrease of expenses by 0.8% was reported (Central Statistical Office, 2013a). Apart from the given indicators poverty is also measured in Poland with, among others, the indicator of relative poverty – showing the percentage of people living in households in which the expenses were below 50% of average expenditure of all households, statutory (taking into account the level of social intervention, and thus the amount of which, in accordance with the applicable law on social assistance entitles one to obtain financial benefits) and extreme (determined at the level of the subsistence minimum). In 2012, extreme poverty affected 6.7% of people; the relative poverty index value slightly decreased, which was 16%, which is 0.7 of percentage point less than in 2011, while below the legal poverty line, there were 7% of Poles and this, in turn, was by 0.5 percentage point more than in the previous year (Central Statistical Office, 2013b). The threshold for social intervention in Poland was not indexed for 6 years, despite inflation and the rising cost of living. The criterion for granting social assistance was valorised in the fourth quarter of 2012 and if it had been the basis for determining the range of basic poverty in the whole 2012 it would relate to 13.2%, and not only 7.2% people (Central Statistical Office, 2013b).

Poverty in Poland threatens especially people who are unemployed, who are living on unearned sources and numerous families. The position in the job market is a factor determining the material and social status of a given person and his or her family. Meanwhile, the unemployment rate at the end of 2012 in Poland equaled 13.4% while 35.4% of people were unemployed for more than a year. The problem of lack of job would be even more severe if a significant number of Polish citizens did not escape its negative effects emigrating from the country. Poverty, high unemployment or a low ratio of employed and job emigration are highly diversified in Poland. However, it is not that decisions about leaving the country for work purposes were undertaken mainly by the residents of regions characterized by a particularly high unemployment and being extremely vulnerable to poverty. This statement is denied even by the Opolskie province where the number of emigrants going abroad per 1000 inhabitants is the highest in Poland. The unemployment ratio is above the national average, but it is far from the maximum while all the indicators characterizing the extent of poverty are at a very low level. In particularly bad situation are the inhabitants of the provinces located in the eastern part of Poland, especially of Warmińsko-Mazurskie where almost 22% of economically active population is unemployed, 13.5% of the population are living in extreme poverty, nearly $\frac{1}{4}$ - below the relative poverty line, and disposable incomes and household spending are at the penultimate position in the country. Also in this province many people decided to emigrate abroad for a longer time, but their number per 1000 inhabitants ranks in fourth place and is clearly lower than in the Opolskie province (Central Statistical Office, 2013a,b,c).

Another important factor increasing the risk of living in extreme deficiency is the place of residence. By far the most common is poverty in villages, because it affects 10.4% of their population. As it turns out, they constitute about 60% of the population living below the poverty level, and at the same time 40% of the total population of Poland. The above-mentioned most

vulnerable to poverty areas of the country, characterized by high unemployment are both areas with a low degree of urbanization. Although the number of households in villages constitutes less than 1/3 of the total number of households in the country, they benefit from 44% of social assistance. A very worrying phenomenon is the fact that children and the youth under 18 are under the most risk of extreme poverty in Poland.

4 The Range of Local Self-government Tasks in the Field of Social Assistance and its Capacity to Finance Them

The social assistance system in Poland was rebuilt in the past quarter of a century and based on the on the concept of decentralization. Many of the most significant tasks related to social assistance were transferred to the local self-government entities in accordance with the assumption that being closer to the citizens they will recognize their needs better and cater to a wider range of them incurring lower costs (e.g. Krzyżkowski, 2010; Communities and Local Government Committee, 2011). Currently, for social assistance in Poland both the state administration and self-governments are responsible, but the burden of implementation and financing the majority of tasks rests mainly on municipalities and districts. The obligations of the municipalities include three groups of duties i.e.: building a system of social assistance, granting social assistance in the form of direct or indirect financial support and assistance in kind. The domain of the districts is helping families, which is accomplished through many specialised institutions. The provinces usually do not engage with direct social assistance; they focus mainly on developing plans, preparing programmes aiming at solving social problems and making assessments (Śmiechowicz, 2011).

The substantial part of the self-government's tasks in the field of social assistance are own tasks while some of them are made mandatory, and some on a facultative basis, after recognising the needs of the population and taking into account the financial capacity of the unit. Additionally the self-governments perform the tasks commissioned by the state's administration and the legislation. These tasks and certain mandatory own tasks include the payment of certain allowances of rigidly specified amount based on the beneficiary's income, local governments receive funds from the state budget in the form of targeted subsidies. In practice, these amounts are often not enough to fully cover the expenses and the self-governments subsidize their implementation from their own revenues (Śmiechowicz, 2013).

The division of public revenue between the government sector and the self-government sector has been controversial since the beginning of the existence of municipalities, districts and provinces in Poland and in the assessment of local government it is unjust, and the transferred revenues inadequate to the tasks of local government. Such opinion is expressed also in terms of the tasks in the field of social assistance, which the majority were ceded to local governments, but not secured with adequate means for their proper execution. Meanwhile the financing of social assistance tasks by all levels of self-government in Poland absorbed from 10,4% in 1999 to 16,5% in 2006 of their budgets. In 2012 they spent almost 26 billion Polish zloty for social services and policy, which accounted 14,3% of all local government expenditure. Most of them i.e. 51,4% were covered by municipalities; cities with district rights financed 29,0% of these expenditure, districts – 16,8%, while provinces – only 2,8%. The majority these resources were assigned to current tasks. Despite the urgent demand for improving the infrastructure of

institutions working in the field of social assistance, for investments was spent less than 1% of mentioned sum.

It should be emphasized that the financial situation of municipalities, districts and provinces since a few years allocating significant amounts for investments (mostly for transport infrastructure) is becoming more and more difficult. This is reflected in the growing debt and a very large number of units closing the financial year with a deficit. The self-governments cannot currently count on greater support from the state budget, or a significant change in the share of public revenues. The state of the finances of the government sector is in fact catastrophic in comparison to the self-government finances. At the end of 2012, the general government debt amounted to nearly 890 billion Polish zloty, which accounted for 55.2% of GDP. Almost 92% of this debt is the debt of the government sector, and only 8% - the self-government sector (Ministry of Finance). Despite of this, in the forthcoming years local government in Poland has to conduct saving-oriented policy as new, individual limits of debt came into force which are for most entities more restrictive than previous regulations.

5 The Territorial Diversification of Poverty, Unemployment and Social Assistance Expenditure of a Local Self-government in Poland

The amount spent for social assistance and social policy *per capita* incurred by the self-governments located in 16 provinces of Poland differs considerably in the particular provinces of the country and is connected with the unemployment rate and the scope of poverty occurring in the area. Although the trend is unambiguous, but nevertheless there are some deviations, and not in every case the high unemployment rate coincides with a relatively wide range of poverty, which in turn translate into high expenditure of local self-government. This regularity is most clearly noticeable in the Warmińsko-Mazurskie province in which all the discussed values differ significantly from the average characteristic of the entire Poland, so a particularly difficult financial situation of the inhabitants of this part of the country makes the local self-governments in this area clearly more burdened with social spending.

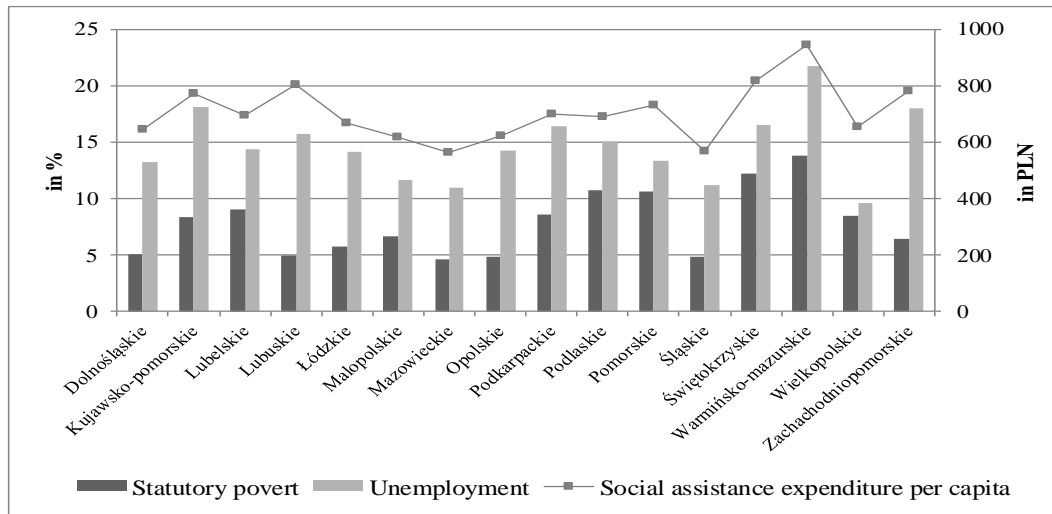


Fig. 1 The local self-government's expenditure for social assistance and policy per capita in the particular provinces against the poverty and unemployment rate.

Source: Own elaboration based on MF and CSO data.

In the Świętokrzyskie province the social assistance and policies expenditures are at the second largest level in the country, which corresponds to the degree of prevalence of poverty, but the unemployment rate, although clearly exceeded the national average, does not belong to the highest in Poland. Social expenditure reach a low level in the Mazowieckie and Śląskie provinces characterised by a good situation – the lowest poverty coefficients in the country and the unemployment rate much lower than the average. However, the social assistance and policy expenditures of the self-governments of the Lubuskie and Zachodniopomorskie provinces do not fall into the general trend which is characteristic for Poland. In those provinces they are over average although the level of poverty is of small or even very small range there. However, simultaneously the unemployment rate is on very high level there which is not typical.

The research findings do not confirm, at least on the level of provinces, the thesis that the size of the revenue of local self-governments located within their territory determines the scope of social assistance and policy expenditures. A clearer link appears with the need for social assistance due to poverty or unemployment, than with the resourcefulness of the self-governments. Only in three of five provinces (i.e. Warmińsko-Mazurskie, Zachodniopomorskie and Pomorskie) in which the self-governments had incomes exceeding the average level characteristic for the country, social assistance and policy expenditures were also higher than the average amount of funds spent by self-governments in this field. In two remaining ones, distinguished by the highest income per capita in the country, i.e. Mazovia and Lower Silesia, expenses on social assistance were significantly lower, which is related to the lower demand of the local community. Similarly in the provinces where the self-governments had the lowest per capita income the social assistance and policy expenditure were related to the range of statutory poverty and the unemployment rate.

Taking into account the above mentioned results it would be favourable to deepen the analysis checking what the size of benefits (in cash and in kind) granted to the beneficiaries of social assistance in individual provinces is. These benefits constitute only a part of expenditure financed from the budgets of the local self-government's units for social assistance and policy. These expenses are closely related to maintaining and ensuring the functioning of a number of

institutions, social work, creating plans and programmes and other activities that do not directly take the form of benefits for specific individuals. Most of the tasks related to the grant and transfer of benefits, both monetary and non-monetary, are implemented by municipalities within their own tasks, for some of them, i.e. permanent or temporary benefits, which are granted compulsorily and are of rigidly specified height, local governments receive funding from the state budget in the form of targeted subsidies. Covering the costs of implementation of a part of the obligations with transfers from the state budget makes the full coverage only slightly connected with the financial ability of the self-governments. However, there are tasks of benefit nature undertaken by municipalities on a totally facultative basis. In the case of these units the tasks are precisely defined and include also such benefits as granting and payment of special-purpose benefits and assisting in becoming economically independent. In the subsequent parts of the analysis they shall be called optional *sensu stricte* benefits. Among the obligatory tasks of every municipality there are also such benefits which are "granted" by the municipality, and such which "may be granted". The benefits which are discretionary for municipalities include benefits for health care services related to a random event, granted in the form of a credit ticket etc. Along with the facultative *sensu stricte* benefits, they shall be referred to as facultative *sensu largo* benefits. The expenses incurred by the self-governments for their financing shall constitute the subject of the following discussion.

As the data presented in the above presented chart show there is no close relation between the income of the municipality (including the cities with district rights) per one inhabitant and the amount spent on facultative benefits per one beneficiary. However, most often the units in which the income per one inhabitant is low, also grant relatively small amounts for the discretionary social assistance per every beneficiary. These amounts in the particular provinces in Poland are much diversified – the lowest values are found in the eastern provinces and the poorest provinces in the country i.e. provinces of Lubelskie and Podlaskie.

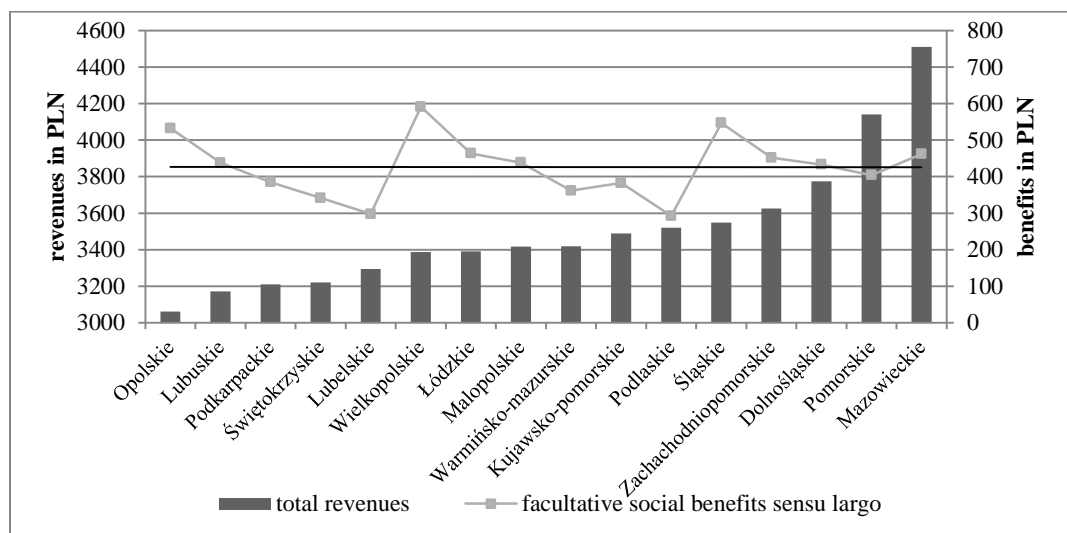


Fig. 2 The amount of facultative *sensu largo* benefits per one beneficiary compared to the total income of the municipalities *per capita* in the given provinces in Poland

Source: Own elaboration based on MF and ML&SP data.

The fact that the self-governments located in the eastern part of Poland did not reveal in 2012 total income per capita on the lowest level in the country is connected with the assistance

received as being the poorest in the European Union. These financial means increase their income base, but do not serve the financing of the discussed type of expenditure, whose main source is own revenue (in Lubelskie the lowest and in Podlaskie much lower than the national average) and possibly the general subsidy. Benefits expressly higher than the average amount of facultative *sensu largo* benefits per one beneficiary were granted in Wielkopolskie, Śląskie and Opolskie; only one of these – the Śląskie province was characterised by income exceeding the average.

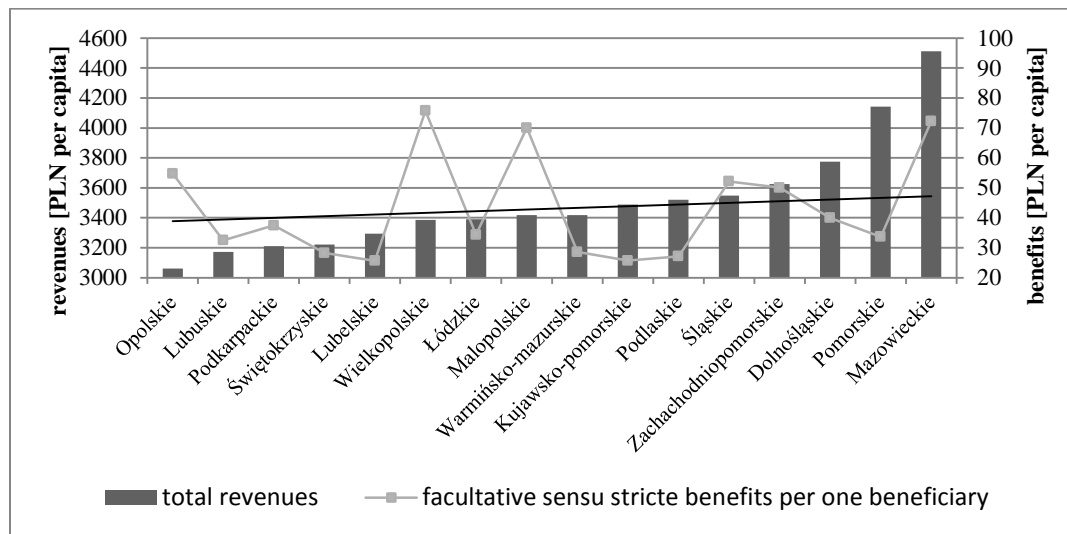


Fig. 3 The amount of facultative *sensu stricte* benefits per one beneficiary compared to the total income of municipalities *per capita* in the given provinces in Poland

Source: Own elaboration based on MF and ML&SP data.

Even much greater disproportions are revealed in the case of benefits whose granting is fully dependent from the decision of the municipality. In the provinces of Wielkopolskie, Małopolskie and Mazowieckie they were about three times higher than in the provinces of Lubelskie, Kujawsko-pomorskie, Podlaskie, Świętokrzyskie, or Warmińsko-mazurskie. Between the amount of facultative benefits granted by municipalities of the particular provinces in the country, and their total income there is also no clear relation, however, in the enumerated five provinces, where the benefits were the lowest, the amount of own income was also low. It cannot be also stated that entities with sizable debt tend to reduce expenditure on facultative benefits. On the contrary in self-governments located in provinces where facultative benefits *per capita* were the highest in the country, the level of debt ratio exceeded the average in the country, while in the municipalities and cities with district rights situated in provinces where this benefits were the lowest – debt ratio attained below average level. When assessing the importance of this category of benefits as the source of financial assistance and assistance in kind for the members of local communities being in difficult material situation it must be admitted that it is inconsiderable. In 2012 it constituted only 0.5% of the total amount of benefits granted by the municipalities, so it can be stated that these units use only a narrow range of their competencies. It is also interesting how the amount of these benefits depends on the number of people suffering from poverty in a given province – whether it increases along with its range, or on the contrary, the increased demand for the benefits makes their amount smaller due to the limited financial abilities of the self-governments. The results of the research shows that the higher percentage of the inhabitants of a given province is entitled to social benefits, the lower the amount of the benefits established by the municipalities or granted by them on a discretionary basis per beneficiary.

6 Conclusions

The conducted analysis indicates on significant differences in the scope of poverty and the most determining it factor - the level of unemployment in provinces Poland. These phenomena occur with particular intensity in Eastern Poland and clearly affect both the expenditure and the revenue of the local self-government in the whole country. According to the fact that the own revenues of its entities are mostly based on income taxes and are closely related with local economic base, the richness of municipalities, cities with district rights, district and provinces is, in high extend, determined by the financial situation of the residents of it and highly diversified. Large number of unemployed and people in need inhabiting in the particular local self-government unit occurs in high expenditure on social assistance. The performed studies do not confirm the thesis that the increase of income per inhabitant being at the disposal of a local self-government unit results in increase in expenses for social assistance and policy. In some cases such a relation can be actually observed but usually the more resourceful units spend less for the discussed needs than the poorer self-governments. In wealthier local self-government units the demand for help and social policy is lower, hence lower expenditure to finance this kind of tasks *per capita*. Larger financial capacity of local self-governments is instead reflected in the amount of granted facultative *sensu stricte* benefits.

Taking into account the results of the above presented studies some conclusions and recommendations can be formulated. In countries characterized by large disparities in development and wealth of individual units of local self-government and a high proportion of people living poorly, decentralization of tasks in the field of social assistance and policy and funding the support with own income is risky, as it may lead to failure in satisfying significant needs of local communities being most in need of social support, its low efficiency, reduced access to social assistance and services of low standard by poorer municipalities. Recognizing the increased efficiency of local self-government over the government administration in terms of implementation of the tasks of social assistance one can wonder about the proper source of funding of the tasks in this field. Undoubtedly, the financing of a substantial part of the benefits granted by the local self-government, as is the case in Poland, is a kind of protection for both the local self-governments and the people eligible for these benefits, but it is not an ideal solution. The transfer of funds from the state budget in the form of general subsidies, the purpose of which could be stated by the self-government bodies, seems to be a much better solution.

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