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Measuring human development on county and voivodeship level in Poland

Summary

This paper presents a summary of the methodology of computation and the use of the measure of human development in Poland. The United Nations Development Programme (UNDP) prepared a new measure for the Polish government. The Local Human Development Index was created on the basis of the existing Human Development Index and is used to measure human development at county and voivodeship level. The index is based on data available in the public statistics and administrative records. The article also examines the relationship between the territorial allocation of the cohesion policy funds, Operational Programme Human Capital and social spending and the level of human development. The effect of which is a confirmation of the hypothesis that funds under those public interventions are allocated in regions with lower levels of human development, but also a suggestion for a better strategy of cohesion funds allocation.

Key words: human development, county, human capital, social policy, measurement

Introduction

Social policy is a science, which aims to “purposefully organise social progress” (Danecki 1974) that is at the same time connected with a diagnosis of the social situation. The fulfilment of the aims and the outcome of social policy can be most effectively evaluated by the means of social indicators, namely measurements that reflect the individuals’ life conditions (Kurowska 2001). On the other hand, social policy is “a practical knowledge which investigates changes that occur in the social structure due to purposeful activity of social groups and institutions, it’s about the many and various things that affect the kinds of life that people live and means to live it” (Szumlicz 1994), where social indicators can be applied (Kurowska 2011). Material paradigm, which is based on the notion that possessing something is automatically translated into the state of being happy and human development, was the main stream of the political thinking for decades. In the early 70s alongside the formation of the social indicator movement there were voices about dethronement of GDP as the main indicator of development and as a developmental goal.

However, GDP still plays crucial role in spite of its disadvantages as not taking into consideration non-economic factors for measuring prosperity and man’s development. In the end, what was pointed out by the authors of the report for the President of France (Stiglitz, Sen, Fitoussi 2009), achieved quality of life, therefore health, education, and the leading of a valuable life among loving and respectable people are among the most important factors for everyone. Crowning achievement over the works on the different social indicators can be the approach, which was shaped by Amartya Sen and Mahbub ul Haq. They created a category of social development, which gives the rise of human’s freedom as well as the possibility of living the life people consider to be the best for them. The matter of this approach is to increase individual’s possibility of choice. Amartya Sen (1993) wrote that the human development consists of two elements: creating new “possibilities” for people – such as improving health conditions, growth of knowledge or competences, and how people use those newly acquired possibilities – within the purposes of manufacturing, entertainment, and membership in culture, in social and political spheres. “Capabilities” should be understood as various combinations of the attitudes and activities of individual, which are attainable or available for the people, and constitute what is described as “good life” from the perspective of different kinds of people. Putting emphasis on “possibilities” and not simply on achieved results underlines the freedom of choice of every person.

Human development by UNDP (United Nations Development Programme) is the process that helps to improve socio-economic conditions in a given society. It is more than economic development. Over time many prominent experts have contributed their ideas to the Human Development Reports and helped develop the HDI methodology. In 1990, for the first time UNDP has published results on the study of human development to raise the awareness of the challenges, which countries at

different stages of development were facing, and to mobilise public support for policies aimed at improving the quality of life at both the national and international levels.

UNDP in Poland alongside the Ministry of Regional Development and Warsaw School of Economics started a project aiming to create and use a new measure of human development on the local level, the methodology of which is based on the Human Development Index (Arak et al. 2012). It became part of the strategic system of monitoring developmental goals in the strategic documents of the Polish Government, for example in the National Development Strategy (Ministerstwo Rozwoju Regionalnego 2012). The indicator is also used for better planning of the regional policy, also referred to as the cohesion policy; a policy with the stated aim of improving the economic well-being of regions in Poland and also to avoid regional disparities, which is mostly funded by the European Union. This policy also has a role to play in wider challenges for the future, including climate change, energy supply and globalisation and as such should be planned using thorough evidence. In this article the relationship between the presented indicator and the certain kinds of social expenditures and cohesion policy will be analysed.

Local Human Development Index

Local Human Development Index (LHDI) in accordance with the will of the Ministry of Regional Development, may serve as the basic instrument for a better planning, allocating, supervising and control of how the funds are spent and implemented up until 2020 (Arak et al. 2012). There was also an attempt to conduct an analysis of human development dynamics. However, the timeframe had to be shortened due to limited data availability; that is why it only covers the years 2007-2010 (Arak et al. 2012). LHDI was created according to the principles of simplicity and the necessity to connect social as well as economic measures, which was postulated by Mahbub ul Haq (ul Haq 2003) during the formation of HDI in the 1990s. HDI, for years used for international comparison, slightly changed in 2010. Nevertheless basic measurements: education, health, and standard of living are still used to rank countries in their progress on improving human development.

An established definition of an indicator is not set out by the Polish literature. Instead, the concept of an indicator is used interchangeably with the concept of a measure (Borys 2005). There are some differences between these two terms in Social Policy understood as a science. The measure is a quantitative estimate, which describes and measures economic and social processes and phenomena. The indicator is an observable and calculable feature of a subject or phenomenon, the existence of which implies the existence of other phenomena for us to measure (Szarfenberg 2008). In the field of human development the measures are the partial indicators of the synthetic measure and the indicator is the Human Development Index.

The LHDI as a measure of human development at regional level may provide the central authorities reference points for their strategic goal posting in the future (Ivanov

& Pelah 2011, UNDP Poland 2006). However, a major problem exists in regard to data availability and their quality at lower territorial levels: the smaller territorial unity, the bigger problem with the appropriate quality data. Especially crucial is to receive the data concerning expenditures on health care, which theoretically can be obtained through the National Health Fund on the county level. However, it is not possible due to the fact that the Fund's headquarters have an underdeveloped IT system. The same problems concern indicators of public health, morbidity rate, and death rates, which are recorded in the health care facilities and are available on the county level. The lack of appropriate data makes such territorial comparisons impossible, however UNDP have found other relevant data sources. At lower levels of territorial division data concerning disposable income can be calculated on the basis of data from the Internal Revenue. At the same time most of the information in the field of education is available at least on the county level, through the Educational Information System (pol. System Informacji Oświatowej), which was created by the Ministry of Education.

Due to the limited availability of proper data, in order to construct a robust and up-to-date indicator, UNDP decided that the county should serve as the basic unit of this analysis. In Poland there are 314 counties and 65 cities with county rights. The choice is further motivated by public tasks exercised on the county level including education at the secondary level and the healthcare system. Additionally 16 voivodehsips were analysed for regional comparisons.

In order to achieve a high-resolution map of Poland the system of measuring human development should consist of numerous variables. However, as mentioned above proper comparable data is not always available. Complexity and versatility of this measure are desirable, as well. According to ul Haq, too complicated indicator could be too hard to use by the decision-makers. Classic HDI methodology consists of three crucial elements for each individual: life expectancy (health), knowledge (education), and also on the standard of living which would allow living at certain levels of prosperity (represented by the level of income). Barbara Szatur-Jaworska (2008) underlines the fact that the correct choice of social indicators is not only a matter of theory, but also practice as they are applied to formulate goals of various social programmes and to monitor their implementation.

Although, the different dimensional indicators used in the LHDI compared to the standard HDI, the calculation method from the Human Development Report 2010 was used (UNDP 2010). The latest major changes that were introduced to HDI are: the method of aggregation of individual indicators has been changed from the arithmetic mean to geometric mean (to reflect the limited substitution of the individual dimensions of human development), and educational measures were changed: instead of the ability to read and write and the average enrolment rate, the mean of years of schooling was used. To sum up, the LHDI value is calculated using the geometric mean of partial indicators on a scale from 1 to 100. The LHDI value depends on the threshold values, that is on administrative units with best and worst county results for each of the variables. Threshold values are the minimum and the maximum values

observed between 2007 and 2010 for a given variable. The dimensional indices have no weights, because it is difficult to distinguish which of the three: education, health and income are more important than the others.

Table 1 Dimensions of Human Development and the LHDI sub indices

Dimension	Health	Education	Welfare
LHDI sub indicators	Average life expectancy at birth indicator (Estimated life expectancy at birth)	Pre-school education indicator (Enrolment rate of children in pre-school education: 3 to 4 years of age)	Welfare indicator (Average persons welfare level)
	Aggregated mortality index (Aggregate mortality rate due to cancer and cardiovascular diseases)	Lower secondary school exam results index (Average results from the lower secondary schools exam – mathematics and natural sciences only)	
LHDI dimensional indices	Health Index	Education Index	Welfare Index
Local Human Development Index (LHDI) – at county and voivodeship levels			
Human development on a local and regional level			

Source: Own study.

Map of human development in Poland

An income ranking does not always reflect the distribution of human development. The value of the synthetic index is a result of the values of group indices and should be interpreted as a whole. For example, the Lesser Poland voivodeship is second in the LHDI ranking, while the value of its income index is below the average for all voivodeships. The Świętokrzyskie voivodeship has the lowest education results, a higher mortality rate and one of the lowest income levels among the regions analysed. What is more, the voivodeship has fallen in comparison since 2007 by 2 ranks. This situation is due to the lower education results and the growing mortality rate. The same negative effects touch upon the West Pomeranian voivodeship.

The unbalanced spatial distribution of regional development processes in Poland is also historically conditioned, most of all by the phenomena originated in the Middle Ages and the consequences of the partitions of Poland (period which lasted from

1772 until 1918). Due to historical processes and contemporary development conditions, today the Polish territory is characterised by three types of disproportion: development gap between large cities and the rest of the country, between Eastern and Western Poland, and increasing intraregional disproportions, which can be seen in the illustration of human development (map 1 and table 2).

Table 2 Voivodeships ranking according to LHDI value in 2010 and change of voivodeship rank in comparison to 2007

Voivodeship	LHDI ranking	Change of rank in comparison to 2007	LHDI	HI	EI	WI
Mazovian	1	0	60,21	58,18	61,68	60,84
Lesser Poland	2	0	51,93	69,10	57,65	35,15
Pomeranian	3	0	51,14	71,28	47,16	39,79
Greater Poland	4	0	50,22	63,32	50,19	39,86
Silesian	5	0	49,54	48,39	53,92	46,59
Opole	6	0	46,95	59,76	55,94	30,96
Lower Silesian	7	0	46,34	47,61	48,79	42,84
Podlasie	8	1	44,40	66,08	51,60	25,67
Lubusz	9	2	44,36	54,72	47,21	33,79
Podkarpacie	10	0	43,77	72,28	48,15	24,09
West Pomeranian	11	-3	42,89	52,31	42,51	35,48
Warmian-Masurian	12	0	42,33	58,61	41,85	30,93
Kuyavian-Pomeranian	13	0	41,22	49,17	42,31	33,67
Lublin	14	1	39,55	48,61	46,46	27,40
Łódź	15	1	39,28	31,48	52,25	36,85
Świętokrzyskie	16	-2	36,78	45,95	39,18	27,62

Source: Arak et al. 2012.

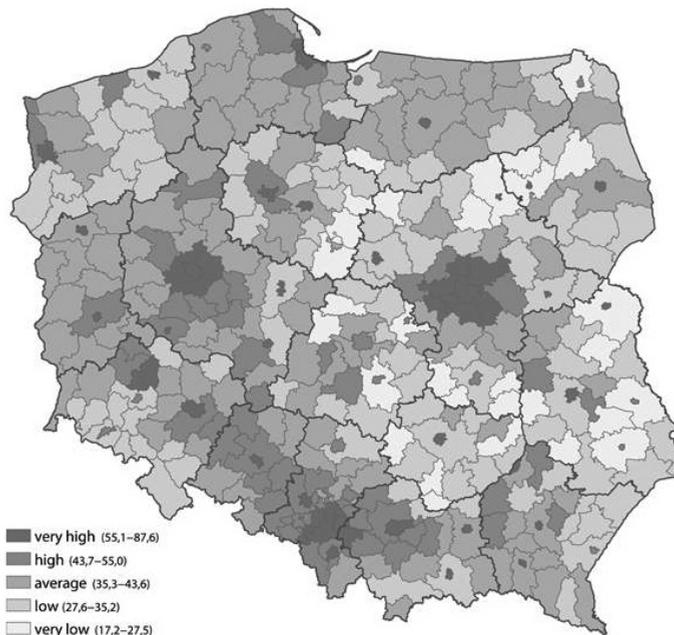
The phenomenon of the “Warsaw Island” is also worth noticing – the Warsaw urban region, significantly influences the high index values for the entire voivodeship, so that consequently the region has the highest level of human development in Poland. At the same time, as we can see in map number 1 the Mazovian voivodeship embraces many counties with low index values and is a perfect illustration of the intraregional disparities.

Nonetheless, one must remember that cities are not heterogeneous. Some of Warsaw’s city districts have lower index values in education and the lifespan varies greatly between the districts of Praga-Północ and Wilanów. On the other hand, it turns out

that Wrocław, Lublin and Głogów are islands of prosperity, the multifaceted picture of Lower Silesian and Lubusz voivodeships is much more complicated. High values of the LHDI are achieved by different partial indicators: education and health place Podlasie, Lesser Poland and Opole voivodeships higher in the ranking, Podkarpackie voivodeship is primarily situated higher by health indicator. On the other hand Upper Silesia has lower values of the LHDI primarily because of the health indicator, whereas Lower Silesia has lower values because of the health and education levels. In this context it is crucial to refer to the territorial cohesion. The essence of this category is not to provide a steady spatial increase, but to integrate spatial development activities with territorial factors (benefits from the metropolitan area, local spatially conditioned assets as for example social capital) in the development process (Zaucha 2012). For example, despite the fact that the Mazovian voivodeship has reached the highest LHDI value among voivodeships, it turns out that among counties the level of human development outside the Warsaw metropolitan area is lower.

Urban centres are the hubs of the economic, social, scientific, cultural and institutional cooperation network, and thereby as centres influencing the development of the entire region, they are of key significance for the development of every region. They are the dark spots on the map seen below.

Map 1 Local Human Development Index in counties in 2010⁵



Source: Own study.

⁵ Counties have been classified into 5 groups from very high, high, average, low to very low level of human development on according to the natural breaks classification method.

Public expenditures on human development

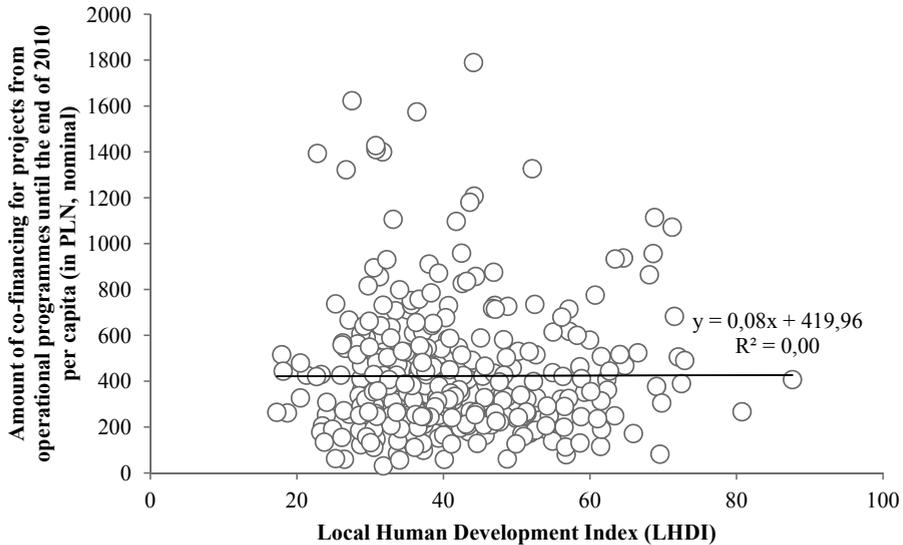
Activities and strategies financed from public funds, including those in the 2004-2006 and 2007-2013 cycles, should be subject to specific standards of measurement, evaluation and meta-evaluation, i.e., the assessment of both planned and conducted evaluations. These standards concern not only the description of activities and justification of public interventions (why are they being done?), but also their outcomes (what has been done and how?). It is particularly important to properly assess whether the interventions being implemented and financed from public funds are effective and useful for the local community, among other things, in terms of human development. In “Reinventing Government“ Osborne and Gaebler (1993) justify the need to measure the effects of the projects, programmes and public interventions stating that if success cannot be rewarded, you certainly will reward failure. In case of the Polish development (and cohesion) policy it can mean spending public funds on different irrelevant purposes rather than on those resulting directly from the definition of human development.

To count the inputs (spending) is not the same as to count results. The LHDI, whose relationship with public intervention is analysed in this part of the article, should with a wide timeframe make it possible to measure the effects of the intervention. At this stage, it is worth distinguishing between the concept of “contribution” and “attribution”, because the statistical analysis alone does not allow for the clear establishment of a cause and effect relationship between social policy expenditures and the rising and decreasing of human development level. It can only be described as co-occurrence. Expenditures from Human Capital Operational Programme and social policy show that more funds were allocated in regions with lower levels of human development.

The regional policy is aimed at sound management of all financial resources allocated to development that, so far, have been managed by the ministries and other public institutions. Allocation of resources available under individual sectoral policies, according to the territorial approach and the principle of subsidiarity, which enables the self-governments of voivodeships to increase the amount of financial resources for regional policy implementation, and improve the effectiveness of interventions. Local government entities are, next to entrepreneurs, major beneficiaries of EU funds, i.e., funds from the EU budget (European Regional Development Fund, European Social Fund, Cohesion Fund). In the financial framework for 2007-2013, around 25 per cent of EU funds allocated to Poland from structural funds will go to co-finance projects implemented by local governments under National Operational Programmes (NOPs) and Regional Operational Programmes (ROPs). Local government entities, as beneficiaries of EU funds via ROPs, are mostly interested in investment in road construction and upgrades, water and wastewater management, waste management, development of renewable energy sources, and access to broadband Internet for municipal residents. The projects related to innovation, R&D and tourism are

also important but they were associated with the organisation of the 2012 European Football Championship in Poland.

Graph 1 The relationship between the amount of co-financing for projects from operational programmes until the end of 2010, per capita (PLN, nominal) and the value of the Local Human Development Index (LHDI) in 2010, by counties

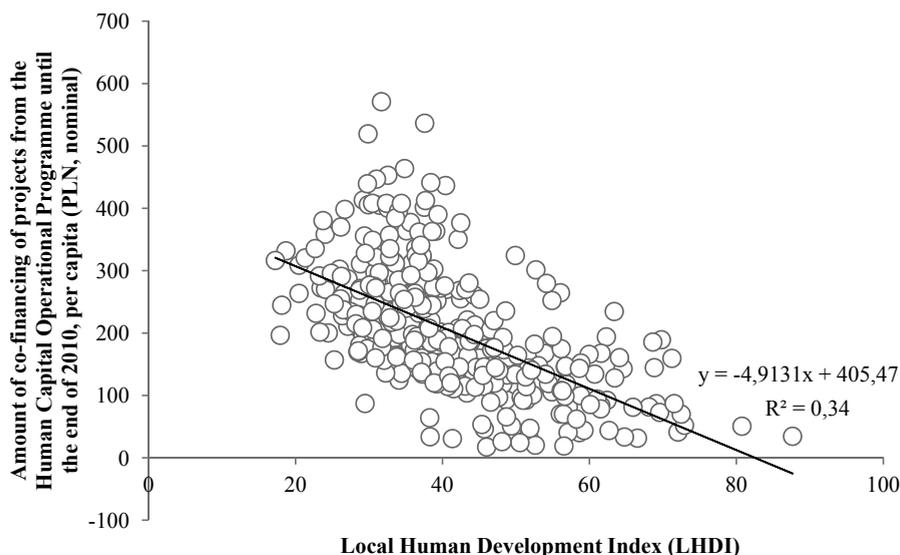


Source: Own study.

The authors of the report on human development in Poland point out that the analysis of the total sum from cohesion policy programs within the National Strategic Reference Framework in conjunction with LHDI indicates a weak correlation. The relationship between spending on projects funded by Operational Programmes (including the Eastern Poland Operational Programme) and the Local Human Development Index is very weak – the linear correlation coefficient is 0.04 (Graph 1). However, after analysing individual operational programmes only one correlation coefficient came up that has strong statistical relationship with human development – it is The Human Capital Operational Programme implemented in 2007-2010. Interestingly, the English term of human development is often translated into Polish as “social development” or, literally, “human development”, which in this case is only a symbolic co-occurrence. The linear correlation coefficient for LHDI 2010 and the resources spent under the Human Capital OP by the end of 2010 is -0.581. It is by far the most significant correlation observed between human development measured by LHDI and cohesion policy spending. The regression line is leaning to the right, which means that the higher human development, the smaller funds from The Human Capital Operational Programme was spent in 2007-2010. It can be concluded that

spending funds from The Human Capital Operational Programme was carried out on the regions of lower level of human development. Therefore, the study confirms the existence of a strong link between human development and expenditures under the Human Capital Operational Programme. Investments in education and skills are among the core factors contributing to increases in incomes and health improvement in a given community.

Graph 2 The relationship between the amount of co-financing of projects from the Human Capital Operational Programme until the end of 2010, per capita (PLN, nominal) and the value of the Local Human Development Index (LHDI) in 2010, by counties



Source: Own study.

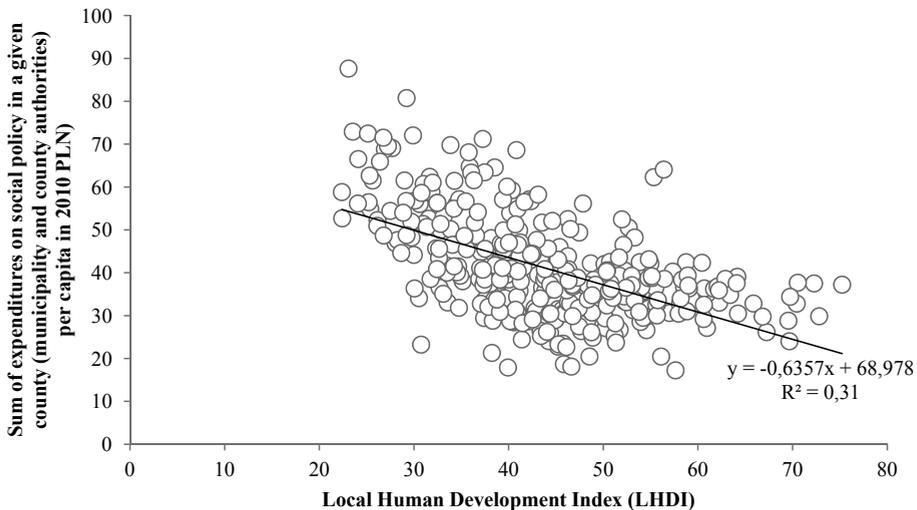
The Human Capital Operational Programme corresponds to about 30 per cent of the total money spent on all programs and priorities of the cohesion policy. Unfortunately, even the graph above is not completely reliable because of the quality of reporting of expenditures under the financial framework of 2007-2013. The analysis is even harder with the data from the financial framework of 2004-2006, because there is no possibility to assign it territorially (Arak et al. 2012). Various data exists but it is far too often unstructured and databases even within one institution are not always coherent. “Information” is abundant but it cannot always be transformed into “data” that is useful for local level policy-making. Polish public institutions need to develop rules for collecting and processing local level data in a coordinated manner, following common standards and methodologies. The lower the level of analysis, the more difficult (but also more interesting and meaningful) it is to analyse.

The fulfilment of the goals and the outcomes of means undertaken through social policy can be most effectively evaluated by the LHDI. According to Danecki (1980)

and Szarfenberg (2011b) the goals of social policy can be universal, but always connected with rising standard of living or human development.

For the social policy the most important issue is the link between human development and the social welfare expenditures – in this particular case in order not to alter calculations – benefits payable in the event of natural disasters were not taken into consideration. The lowest levels of local government, county and voivodeship take on most of the social services. Total expenditure on social services and on other social policy tasks consist of: the sum of welfare benefits and family policy expenditure in the budgets of local governments (municipalities and counties), excluding benefits paid due to natural disasters, divided by the number of inhabitants of the county.

Graph 3 The relation between the sum of expenditures on social policy in a given county (municipality and county authorities), per capita in 2010 (PLN) and the value of the Local Human Development Index in 2010 according to counties



Source: Own study

When reading the graph above, one has to remember that it primarily shows territorial and regional differences and not necessarily the differences in the amount of benefits between particular regions. Regression line is leaning to the right, which means that there is a smaller sum of the social transfers per capita in the voivodeship with a higher level of human development. The amount spent on social policy per capita was higher in the regions of lower level of human development in 2010. The linear correlation ratio between expenditures on social policy and the LHDI is -0.555, which shows a strong relationship between those two variables. The following counties have the highest social policy expenditures: Czulchów, Elbląg, Bartoszyce, Braniewo, Gryfice, Świdwin, Lipno, Radziejów, Nowe Miasto. The lowest level

of transfers takes place in the following counties: Poznań, Pszczyzna, Warsaw-West, Wrocław, Tychy, Skierniewice, Pruszków, Warszawa, Wrocław, Bieruń-Lędzin.

Policies directed at fostering social inclusion must also take into account the geographical concentration of disadvantage. The causes and consequences of poverty and exclusion can often be found clustered together in particular areas, effectively interacting in such ways as to exacerbate and compound each other. Common patterns in the geographical concentration of disadvantage are evident across the map of Poland. Indeed, it is clear that the intrinsic characteristics of poor neighbourhoods (in terms of human development, i.e., income, educational attainment, and health) do not change over time and that geographic exclusion may preclude such areas from being able to exploit wider positive macroeconomic changes. Differences between the experiences of disadvantage and exclusion in rural and urban areas must also be recognised, as social exclusion does not develop in the same ways nor does it take the same forms in these two different contexts. The so-called spatial poverty trap will therefore continue to pose additional challenges to job creation and entrepreneurial development, unless the design and delivery of local development policies (especially social policy) effectively addresses patterns of social exclusion at both the individual and community levels. Accordingly, the territorial element of social exclusion and level of human development is an important one to consider when designing and implementing active social policies on sub-national level.

Summary

Intraregional differentiations in Poland can increase, provided that they do not happen at the expense of the weakest parts and groups of people in the country. According to Jan Danecki (1974), achieved standard of living and quality of life, degree of equality and justice, harmony of coexistence, and the influence of the wide circles of the societies on direction of changes reflect human development in the greatest degree. It is hard to disagree that the aims of human development are closely connected with social policy. An attempt to describe reality by means of a new indicator can help with social diagnosing. This tool can help to explain why some regions are poorer and the other ones are wealthier. The results should be taken with a moderate approach since the parts of the indicators from the field of health care need further investigation. They lack reflection of morbidity rate instead of mortality rate, due to limited availability of data. Changes that take place in Poland, especially in living conditions and in social transformations, need more and more versatile and up to date empirical knowledge. The LHDI should provide monitoring of those changes and facilitate making favourable decisions concerning policy intervention.

Local Human Development Index in comparison with expenditures on the one hand on social policy and on the other hand on Human Capital Operational Programme proves that public funds are mostly allocated in counties with lower levels of human development. It means that when planning regional policy in the new financial

perspective (2014-2020), the European Social Fund (currently the Human Capital Operational Programme but it will be replaced with a new one in 2014) should be assigned more appropriately and spent on projects performed in poorer regions.

The lack of evidence that EU funding is provided for projects in underdeveloped regions means that the government should put pressure on using the so-called territorial contracts. The new territorial contract enables the government and the self-government of the voivodeship to agree on the most important objectives and projects implemented (and financed) under the regional development policy. The contract applies only to those projects, whose implementation is significant in terms of government regional policy and self-governments development policy. Most of the projects agreed in the form of a contract should be implemented on the areas of strategic intervention, i.e., with low LHDI value. This will preserve the principle of geographical and thematic focus of the measures. Thereby, sectoral interventions will be also adjusted to regional needs.

The actors performing projects from EFS funds should be seeking to tackle the complex dynamics underpinning poverty. It is this complexity, which demands that policies, if they are to be effective, must be coherent in their design and implementation. This means not only across government departments but also between national and sub-national levels of government, as well as involving and incorporating other actors in the design and implementation of policies. The most critical opportunity for encouraging social inclusion lies in the development of active social policies on the local level which seek to increase access to economic opportunities (or as Amartya Sen would put it “capabilities”). Such policies can address education and training short-falls for both young people and adults, as well as the provision of employment opportunities for those who experience difficulties accessing employment as a result of long-term unemployment, poor skill levels, health problems (also those undiagnosed) or disadvantage due to disability. They can also contribute to incorporating older people into economic activity, thereby addressing the challenges of ageing populations. By equipping individuals with the necessary skills, e.g., digital competences to access economic opportunities and thereby helping them to avoid the poverty trap of welfare dependency, vulnerability to risk factors for social exclusion is reduced and intergenerational outcomes improved. Social economy is an example of improving the capabilities of the disadvantaged performed in the cooperation of local governments and NGO’s, but still on a small scale in Poland.

Funds spent from the Operational Programmes should be further studied for the directly observable effects of the intervention, because – as we can see from the lack of relationship between fund allocation and human development – the rich regions benefit from cohesion policy just as much as the poorer ones. From this perspective, it seems necessary to create a consistent system of evaluation based on the data on financial flows, the benefits in terms of employment, the discontinuation in use of social services and the duration of the project (both as part of the social policy and projects financed from the European funds). For these purposes administrative

records from the Social Insurance Institution, Ministry of Finance, Ministry of Labour and Social Policy and the Ministry of Regional Development can and should be used.

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Streszczenie

W artykule prezentowane jest podsumowanie metodyki liczenia i wykorzystania miary rozwoju społecznego w Polsce. Program Narodów Zjednoczonych ds. Rozwoju (UNDP) przygotował nową miarę dla polskiego rządu. Lokalny Wskaźnik Rozwoju Społecznego został stworzony na podstawie istniejącego Wskaźnika Rozwoju Społecznego i jest użyty do pomiaru rozwoju społecznego na poziomie powiatu i województwa. Wskaźnik bazuje na danych dostępnych w statystyce publicznej oraz rejestrach administracyjnych. W artykule badano zależność między terytorialną alokacją środków polityki spójności, Programu Operacyjnego Kapitał Ludzki oraz wydatków polityki społecznej z poziomem rozwoju społecznego. Efektem czego jest potwierdzenie hipotezy o wydawaniu środków, w ramach tych interwencji publicznych, do regionów o niższym poziomie rozwoju społecznego, ale także sugestia co do lepszej strategii wydawania środków z polityki spójności.

Słowa kluczowe: rozwój społeczny, powiat, kapitał ludzki, polityka społeczna, pomiar