



HIGH SCHOOL OF INSURANCE AND FINANCE

REVIEW

by Dr. Sc. Maksym Bezpartochnyi

professional field 3.8 Economics

e-mail: confer.piel@gmail.com

GSM +380 95 459 2242

of dissertation for awarding the scientific degree „**Doctor of Science**“
in the field of higher education 3. Social, economic and legal sciences

Professional field 3.8. Economics

Doctoral program “Finance, Insurance and Social Security”

Author: Dr. Peter Fraczek

Topic: “Financial cost management and the efficiency of chosen methods in the social assistance system of Poland on the example of Podkarpackie Voivodeship”

1. General description of the presented materials

By order No. 111 of 21 April 2022 of the Rector of the Higher School of Insurance and Finance, I was appointed a reviewer to provide the procedure for defense a dissertation work on the topic: “Financial Cost Management and the Efficiency of Chosen Methods in the Social Assistance System of Poland on the Example of Podkarpackie Voivodeship” to obtain the scientific degree “Doctor sciences” in the field of higher education 3. Social, economic and legal sciences, professional field 3.8. Economics, doctoral program “Finance and Insurance and Social Security”.

The author of the dissertation is Dr. Peter Fraczek, lecturer and director of the Institute of Social Sciences on the basic labor contract in the State University named after Jan Grodka in Sanok (Poland).

The materials submitted by the Finance Department and the Center for Research and Doctoral Studies of the VUZF include documents according to the inventory: CV, copy of the diploma of the educational qualification degree “Doctor”, dissertation in Russian, abstract in Bulgarian and Russian, list and annotations of publications on the topic of the dissertation in Bulgarian and English; publications of doctoral candidate on the topic of the dissertation, certificates for fulfilling the minimum requirements for the award of the academic degree “Doctor of Science”.

2. Brief biographical information about the candidate

Dr. Peter Fraczek is a lecturer and director of the Institute of Social Sciences on the basic labor contract in the State University named after Jan Grodka in Sanok (Poland). Since 2014, Dr. Peter Fraczek has been the holder of disciplines dedicated to the problems of financing social assistance in the Republic of Poland. He combines his teaching work with research in the field of social care management, which has led to the realization of the current dissertation, the subject of this review.

In addition to teaching under the main employment contract, he holds the following positions that are directly related to the topic of the presented dissertation:

From 02.2016-02.2020 – Member of the Regional Municipal Council for People with Disabilities at the Cabinet of the Governor of Podkarpackie Voivodeship (Poland)

From 01.2015-05.2019 – Member of the Supervisory Board for Economics of Municipal Enterprises in Sanok (Poland)

From 01.2021 – present – Member of the Regional Examination Commission for Professional Specialization of Social Workers in Podkarpackie Voivodeship (Poland)

From 01.2013 – present – Member of the editorial board of the magazine “Disability – Problems, Problems and Solutions”, PFRON (National Fund for Rehabilitation of the Disabled), Warsaw (Poland)

From 2012-2014 – Active participant in cooperation in the field of publishing and expert activities with the web portal prawosocjalne.pl (sociallaw.pl)

From 10.2010 – present – Head of the Department of Social Work named after Jan Grodka State University in Sanok (Poland)

From 2014-2016 – Head of specialized training in organizing social work at the State Higher School named after Jana Grodka in Sanok (Poland)

From 09.2002 – present – Member of the Commission for Disability Assessment in the Office of the District Governor (Poland)

From 01.2000-09.2002 – Regional Center for Family Assistance in Sanok (Poland)

From 1998-2002 – Secretary of the Committee on Education, Culture, Sports and Tourism of the Municipal Council of Sanok (Poland).

3. Relevance of the topic and feasibility of the goals and objectives set

The dissertation research of Dr. Peter Fraczek is devoted to an extremely topic of our time – ensuring adequate living conditions for the population and an appropriate level of social protection. Each country intends to create an effective financial cost management system and develop effective tools for implementation in the social security system. On the example of Poland (Podkarpackie Voivodeship), the author carried out a deep analysis and assessed the social protection of citizens and the social security system, identified social risks.

Dr. Peter Fraczek's research is focused on the study of social protection methods, their positive and negative consequences for Poland. The author's proposals concern the system of social protection as one of the foundations of the state's activities aimed at equalizing the life chances of citizens and reducing social problems, including poverty. The practical aspects of the study are reflected in the assessment of the structure of income distribution and transfer payments to the state.

The relevance of the dissertation research of Dr. Peter Fraczek is enhanced by the practical part of the work and proposals at the level of the district administration – Podkarpackie Voivodeship. The importance of the regions in the economic and social policies of countries is systematically growing, and in Poland, this importance was restored through administrative reform.

The goals and objectives of Dr. Peter Fraczek's research have been fully achieved and are reflected in dissertations and publications.

4. Knowledge of the problem

The author is quite thorough and fully oriented in the research problem. The total number of scientific publications is 56, including: participation in collective monographs – 33, one individual monograph published in 2021 in the BAS, 22 scientific articles. Most scientific publications are indexed in international databases, including 2 – Web of Science. All publications of the author are directly related to the problem under study.

It should be noted that Dr. Fraczek has been studying this scientific problem for a long time, as evidenced by the dates of publication on the topic of the dissertation.

The bibliography contains 393 sources, of which 322 are monographs, studies and articles; 42 – statistical data; 20 – regulations and legal acts; 9 titles of netography.

Dr. Peter Fraczek has many years of research and teaching experience, which has resulted in excellent research.

5. Research methodology

To solve the set goal and form proposals and scientific novelty, triangulation methods were used in the dissertation (various quantitative and qualitative research methods in order to deepen the research problem). In the process of evaluating primary and secondary data, research papers, methods of mathematical statistics and analysis were used. A survey was conducted among social workers in the Podkarpackie Voivodeship. The empirical study used an analysis of thematic literature and available documentation (statistical reports, financial reporting, social contracts). It should be noted that the author collected and analyzed a large amount of data in social assistance centers and district family support centers (N = 516) and social workers (N = 420) in Podkarpackie Voivodeship.

6. Characteristics and evaluation of the dissertation

The dissertation consists of the following parts: introduction, four chapters, conclusions, list of references, list of tables, diagrams, figures, and frames.

The dissertation is accompanied by abstract, which briefly outlines the structure and content of the work, as well as the author's theses and the results of the study.

The dissertation is written in Russian, and the abstract is in Russian and Bulgarian.

In the introduction to the dissertation, the main goal and logically related tasks for achieving it are formulated. The object and subject of the study are defined, the methodology of the study is indicated, and the key thesis of the presented work is reduced to the assertion that there are no changes announced by the state authorities in the Polish system of social assistance, which announced the rejection of remittances in favor of intangible benefits, social and professional activation and increased participation people in the process of care.

The **first chapter** is devoted to the essence of social assistance as an element of the socio-economic policy of the state. The author defines social problems and considers the system of social assistance from the point of view of economic and other social sciences. Within the framework of this study, a historical review of the social assistance system in Poland and a monographic review of the research problem were made. Attention is focused on the legal framework and organization of social assistance in Poland. The study of individual socio-economic conditions in Poland led to the conclusion that it is necessary to improve the national system of social assistance, namely: focusing on solving the problems of older people; on the professional activation of persons who have been using social assistance for a long time or are professionally inactive; to help foreigners with access to social assistance.

The **second chapter** is devoted to assessing the financing of the social assistance system in Poland in 2012-2018. For this, the types of benefits, financial costs in the social assistance system in Poland were studied. The results of the study show that in the period 2012-2018 in Poland, budget spending on social security and family support has increased. The author rightly concludes that in Poland the system of social security and

family support from “active” is becoming more and more “passive” and is limited to the payment of money, and not a permanent solution to social problems.

In the **third chapter**, the author considers financial management in the system of social assistance in Poland on the example of the Podkarpackie Voivodeship in 2012-2018, therefore, the socio-economic characteristics of the Podkarpackie Voivodeship are presented. A characteristic feature of local governments in the Podkarpackie Voivodeship is that their budget revenues are largely formed from subsidies and subventions from the central budget. In the process of studying the financing of the social assistance system in the Podkarpackie Voivodeship, a special role is assigned to social infrastructure. Surveys show that almost all types of institutions of the system of social protection of the population of Podkarpackie Voivodeship recorded a significant increase in costs. The main reasons for granting benefits at the municipal level are: poverty, unemployment and prolonged or severe illness. The author points out that the existing social assistance system needs to be improved and a new one created, the task of which will be to transfer funds from the central budget, for example, to families raising children, without checking whether they need this assistance.

The **fourth chapter** substantiates the effectiveness of the social assistance system in Podkarpackie Voivodeship on the example of choosing an instrument – public contract. The need to conclude a state agreement based on half of social assistance is based on the transition to the verification of social assistance and the departure from “assistance” in favor of “support and strengthening” of people in difficult situations. Its driving incentives are the individualization of assistance provided to the person in need of support in a difficult life situation, and the active role of the recipient in the process of providing assistance. The survey shows that the effectiveness of the social contract as a working tool in the insurance system is motivated to change and strengthen independence. Legislation on social contracts also needs to be amended and instruments introduced to apply contractual provisions or sanctions for non-compliance with contractual provisions by those covered by this type of assistance.

Conclusions are presented, recommendations and scientific-practical contribution of the dissertation are formulated.

In general, the author managed to achieve the goals and objectives of scientific research.

7. Contributions and significance of development for science and practice

The following main scientific and practical contributions can be distinguished in the study:

- developed a new theoretical and methodological approach in the field of economic research in the public sector in Poland in relation to the social security system;
- identified future challenges for the social security system in Poland, and also confirmed that this system is not adapted to solve social problems that will become a serious challenge for Poland in the future;
- an in-depth analysis of the financial costs management in the social security system in Poland and the Podkarpackie Voivodeship was carried out;
- proposed the concept of evaluating instruments (social contracts) used in the Polish social security system;
- an empirical test of the effectiveness of instruments (social contracts) was used, on the basis of which mechanisms for improving the Polish social security system were proposed;
- in order to improve the efficiency of financial cost management in the social system, an integrated approach to the further development of social security instruments – social contracts;
- managerial approach to the regulation of the provision of social assistance is proposed, which boils down to the rejection of money transfers in favor of intangible benefits, social and professional activities and the expansion of the participation of individuals in the process of assistance.

8. Evaluation of dissertation publications

The candidate submitted a sufficient number of scientific publications on the topic of the dissertation – 56 publications. Publications are prepared in Polish and English. They are both personal and co-authored and are closely related to the management of financial costs and the effectiveness of individual instruments in the insurance system. In the annotation of publications in co-authorship, the personal contribution of the candidate is indicated. Among them: 33 publications in collective monographs, one individual monograph published in 2021 at the Bulgarian Academy of Sciences, 22 scientific articles (9 publications in co-authorship). The vast majority of scientific publications are indexed in international databases, including 2 – Web of Science. There is a publication in the journal VUZF Review prepared in English. The publications were prepared between 2003 and 2021.

Publications reflect the results of the dissertation research. The results of research in the monographs are of research nature and are devoted to social policy, considered from the point of view of social order and social assistance in the region, with an emphasis on the Podkarpackie Voivodeship. A new theoretical and methodological approach is proposed in the field of economic research in the public sector in Poland in the context of the social protection system.

9. Assessment of compliance with the minimum national requirements

Submitted report on the minimum national requirements for obtaining the educational and scientific degree “Doctor of Science” in the professional field 3.8. Economics shows that they have been fulfilled. All legal requirements are met.

10. Assessment of the applicant’s personal contribution

The dissertation of Dr. Peter Fraczek is an independent research of the candidate, there is scientific novelty, scientific conclusions are clearly formulated, the results are reliable, based on statistical information. There is no plagiarism in the dissertation. The

dissertation materials for the degree “Doctor” are not repeated and were not used in the preparation of the dissertation for the degree of “Doctor of Science”.

11. Abstract

The abstract reflects the goals and objectives of the study, the main provisions of individual chapters of the dissertation, as well as the contribution of the author. The abstract is prepared in accordance with the requirements for its design and reflects the main results and contribution to the dissertation work.

12. Critical comments and recommendations

The presented scientific work was assessed positively by me and clearly demonstrates the professionalism of the candidate, a good theoretical base, possession of modern methodological tools for assessing financial management processes and the effectiveness of selected methods of social assistance in Poland and opportunities for further research. I believe that the dissertation is a complete scientific work that makes a scientific and practical contribution to the further development of financial expenditure management and the identification of optimal tools for the provision of social assistance in Poland.

However, some aspects of the dissertation can be strengthened by evaluating social policy instruments that have shown their effectiveness in other countries of the European Union and analyzed based on comparison, taking into account the financing of social policy expenditures in Poland.

This remark in no way diminishes the quality of the study, the results obtained and the scientific contribution.

13. Personal impressions

I do not know the candidate personally, but based on his biography, teaching and research work, the work done in the dissertation research, I got a positive impression as a full-fledged Doctor of Science.

14. Recommendations for the use of materials and results of the dissertation in the future

I recommend that the candidate in the future pay more attention to finding ways to increase budget revenues, develop the labor market and entrepreneurship, and, on this basis, form an optimal model for financing the state's social policy.

CONCLUSION

The presented dissertation on the topic “**Financial cost management and the efficiency of chosen methods in the social assistance system of Poland on the example of Podkarpackie Voivodeship**”, prepared by *Dr. Peter Fraczek*, allows us to conclude that this study complies with the minimum requirements of the Law for the Development of Academic Staff in the Republic of Bulgaria. The results of the study have a significant contribution to the further development of the theoretical and methodological foundations, science and practice of the social policy of the state, which makes it possible in practice to improve the models of social policy and financial cost management.

The dissertation *contains scientific, scientific-applied and applied results, which represent original contribution to science* and **meet all** the requirements of the Law for the Development of Academic Staff in the Republic of Bulgaria (LDASRB) and the Regulations for the implementation of the RILDASRB. The presented materials and results of the dissertation fully comply with the specific requirements of the Regulations on the admission and training of doctoral candidates at the Higher School of Insurance and Finance.

The dissertation shows that the candidate for the scientific degree “Doctor of Science” **Dr. Peter Fraczek** has in-depth theoretical knowledge and professional skills in Professional field 3.8. Economics, demonstrating qualities and skills for independent research.

Due to the above, I confidently give my **positive assessment** of the research presented by the above reviewed dissertation, abstract, results and contributions, and I **invite the esteemed scientific jury to award the educational and scientific degree of**

“Doctor of Science” to Dr. Peter Fraczek in field of higher education 3. Social, economic and legal sciences; Professional field 3.8. Economics; Doctoral program “Finance, Insurance and Social Security”.

16.05.2022

Reviewer:

(Dr. Sc. Maksym Bezpartochnyi)