# DEVELOPMENT OF SOCIAL TRANSFERS IN THE SOCIAL SECURITY SYSTEM IN LATVIA

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**Abstract**

In the paper, the philosophical and historical evolution of social transfers and their role in Latvia's social security system have been investigated. Definitions of social transfers have been studied, and a classification of social transfers has been made.

The most suitable social security system, which, to a great extent, depends on social policies and a socio-economic situation in a country, is elaborated in every country. Latvia's social security system includes state social insurance, state social benefits, social services, and social assistance that are based on financing from both the state basic budget and the state special budget, and municipal budgets.

Social transfers have a significant role in the social security system in order to provide protection for the population in social risk situations; they impact the welfare of the population during this period.

**Key words:** social transfers, social security system, state social insurance.

## Introduction

The capacity of the social security system and sustainable development play a significant role in preventing social tension and providing welfare in society, which protects society's individuals in social risk cases and provides the disabled with means of subsistence.

Maintaining the financial stability of the social security system and promoting the system's development, as well as achieving a better understanding of the public about the role of the social insurance system are the main tasks to be solved, according to the Latvian National Development Plan 2007-2013, in order to provide a sustainable social security system in Latvia.

Every country has its own history and traditions that served for providing welfare; every country has a specific economic situation and development strategy, as well as a big role is played by decisions and priorities in social policy. Yet the role of globalisation increases, information and experience exchange among countries also increases, which more and more emphasizes the common tendencies in social insurance systems.

To reach as high social welfare level as possible in Latvia, a social security system – a totality of social policy measures – was developed. Its goal is to compensate the population for material, moral, and physical losses. Social risk situations are as follows: disability due to a sickness or occupational trauma, physical incapacity, age, unemployment, maternity, death of a relative, loss of a breadwinner (Social Processes in Latvia, 2003).

Studies on the state social security and the welfare system in Latvia were done by I. Saulāja (Saulāja, 2006), L. Bite (Bite, 2003), V. Kalniņa (2000) where the major attention was paid to the integration of individuals in the labour market after leave for child care; state social benefits that are received during leave for child care as well as the pension system, and an impact of state social policy on the welfare of the population were reviewed.

Within the project 'Studies of the Ministry of Welfare' of the national program 'Labour Market Studies' financed by European Union structural funds, the study 'An Optimal, Employment-oriented Tax and Social Benefit System' (2005-2007) was conducted, the general goal of which was to promote the creation of employment and social policy programs based on the study results, which would stimulate the emergence of an inclusive labour market in Latvia. The study presents the trends in employment and business and gives an evaluation for social insurance benefits in Latvia.

Yet so far few studies on the historical evolution, nature, types, and role of social transfers in the social security system have been done.

The hypothesis: an increase in the average amount of social transfers reduces social risks for the population.

The research aim is to investigate the nature and development of social transfers in Latvia.

To achieve the research aim, the following research tasks were set forth:

- to investigate the philosophical and historical evolution of social transfers;
- to characterise the social security system in Latvia;
- to investigate the nature of social transfers.

**Materials and Methods**

To investigate the philosophical and historical evolution and socio-economic role of social transfers in the social security system, scientific publications, legal materials, and special and economic literature were used in the research.

Information of the Central Statistical Bureau of the Republic of Latvia - 'Income and Living Conditions in Latvia' (2007) and Latvian Statistical Yearbook 2007 (2007), as well as data of the State Social Insurance Agency (SSIA) were used in the research.

The research is based on monographic, abstractly logical, analysis and synthesis, deductive and inductive research methods, as well as dynamic time-array analysis.

**Results and Discussion**

The quality of life is based on the welfare of individuals, security, and the sustainability of society. Since the times of Adam Smith and Carl Marx, possibilities for social activity and an ability of individuals to act have been regarded as the main preconditions for the welfare of people. C. Marx included it in a formula: 'free development of any individual is a precondition for free development of all individuals' (Review of Population Development 2004/2005, 2005).

In the European culture, philosophers Plato and Aristotle are considered the first ones who have given a fairly systematic and quite broad analysis, which is preserved till nowadays, in their works. For many ancient Greek philosophers, society is identical to the state. The views differed only in the issue of emergence of society (state).

**Plato** (428-347 B.C.) was one of the first philosophers known to the modern world who solved political problems at a philosophical level. It was absolutely clear to Plato that there is no equality in society, and a certain internal division is characteristic of it (Catlaks et al., 2003).

One can borrow several ideas from Plato's views in the aspect of human development conceptions:

1. all people are not born equal, society is divided into two groups: free and unfree people;
2. any social stratum performs specific functions, which ensures that the whole state exists;
3. a state is a political and economic entity with a goal to solve all its contradictions.

**Aristotle** (384-322 B.C.) emphasised that the function of the state is to redistribute incomes; excessive wealth is condemned. He also pointed out that a happy life has to be provided for people. In contemporary views, exactly this function provides both educational and health, and social security activities.

**Thomas Robert Malthus** (1766-1834) developed the theory of population. He objectively pointed out that irrespective of human will, wishes, and morale, factors hindering population growth exist; however, it is good from the point of view of the whole mankind. The problem of overpopulation is topical in many places in the contemporary world, and in some places, society is forced to supplement natural regulatory factors with ones introduced artificially. Presently, an opinion that a lot of residents – it is good – dominate in Latvia, which might be quite short-sighted (Brīvers, 2001).

In the second half of the 19$^{th}$ century, a socialistic movement started to emerge; the common goal of its various sub-movements was to accentuate the role of government interventions in the economy and to highlight social problems and contradictions among social classes. The key representative of this movement was **Carl Marx** (1818-1883) who can be ranked as an economist in the classical school. He believed that the whole social life is determined by the economic life of society or the type of production. Right here the main classes appear – the one having a means of production (factories and raw materials), and the second one having nothing like that. The first one rules over the life of the second one.

In the second half of the 20$^{th}$ century, a heterogeneous teaching, which accentuated welfare, appeared. It determined an optimal level of welfare under limited resources, exposing factors for maximising welfare. **Arthur Cecil Pigou** (1887-1959) is considered a founder of welfare economics. To measure welfare, the term 'nation's dividends', which means gross domestic product, was introduced. Income redistribution issues take an important position in Pigou's conception in order to provide support for poor strata. Government interventions are required both in a direct and indirect form. These issues were especially expanded by another economist, **John Atkinson Hobson** (1858-1940). The authors of welfare economics presented a formulation of the problem itself by making a qualitative evaluation of the economy. It became a basis for real welfare models, the development of which was so popular in the second half of the century.

The above-mentioned teachings emphasised the need for government intervention in economy. Yet one has to add that these views were exceptions in those times because the dominating view supported an idea of free market economies. However, the preconditions for government interventions emerged gradually, and the 1928-1933 Great Depression caused a substantial need for reconsidering the role of government in economy. In this way, the conception of government interventions developed by **John Maynard Keynes** (1883-1946) emerged, laying foundations for the whole macroeconomic theory. Keynes' economics tends to solve problems of economic instability. It is a very active price, wage, fiscal, and monetary policy. Overproduction in society is related to an insufficient demand, but demand is not just a problem of individuals. A government can stimulate solvent demand by various social benefits, by setting a minimum wage. With increase in purchasing power, demand will grow, thus stimulating output and engagement of the unemployed in economic activities. To make entrepreneurs interested in it, the government might pay subsidies, give loans, reduce taxes, as well as found state-owned enterprises, creating jobs in them.

As a conception, Keynesianism became very useful in real economic policy during the period from the end of World War II to 1980ies. In fact, the welfare level of industrially developed countries was achieved owing to the advice of Keynesianism (Population Development, 2002).

The term welfare originated from a psychological need for counterbalancing a tendency to research only psychological dysfunction. Scientist Riff started asking a question about what are the main positive features of psychological functioning (Smith, 2000).

State social policy is based on questions related to factors improving the welfare of people and factors endangering it. Welfare is a term to be hard to define. There is no single understanding of it, just like there is no single way of how to analyse it. It includes the welfare of both society and individuals, but the economic, political, and moral and ethical definitions for welfare differ. Economists would probably consider wealth one of the indicators of welfare. It would seem to political scientists that social capital and democratic participation are important. Moral and ethics analysts could ask questions about resource distribution and possibilities for life perspectives as welfare providers for society. Although social welfare is viewed in a positive sense in all these aspects – as a social benefit, sometimes it is used to be perceived as an unfavourable dependence on resources of society. For instance, a large number of claimants for social support/guarantees is considered a problem arising from dependence on social security, especially in the USA (Dudareva et al., 2003).

In a broader sense, 'welfare' means prosperity; preconditions for it are created by each individual's activity, good work and diligence, as well as economic development of a country, social and economic stability etc. (Explanatory Dictionary of Economics, 2000).

In studies, the term welfare is quite often substituted by the term 'life quality'. According to the ideas of Haug and Folmar (Haug et al., 1986), life quality is a term that is freely used to describe general welfare.

It is defined in the Latvian National Development Plan 2007-2013 that the quality of human life is determined by a certain level of material and emotional satisfaction, so that people, inspired by positive emotions, invest their mental and physical potential in developing the state and society. 'Life quality is a complex social, economic, and political term that includes a broad range of life conditions of the country's population. It is characterised by a consumption level available to individuals, an assortment and quality of social services, a possibility to acquire education, live a long and healthy life, participate in the country's political life, by eliminating any discrimination due to gender, nationality, race, religion, individuality, sexual orientation, and age, thus creating possibilities for individuals to realise their potential in the process of raising the welfare of society'.

In the last quarter of the $19^{th}$ century, social insurance with government participation started developing in various countries. Historically, social insurance began due to mutual assistance organisations. Originally, those were 'Friend Societies' in England and mutual assistance societies in France.

The first country that introduced compulsory social insurance was Germany, and it became a pattern for other industrially developed countries. Compulsory insurance against accidents spread the most and fastest, followed by health insurance, pensioner insurance and unemployment insurance.

The welfare system of the Republic of Latvia started emerging right after its independence was declared on 18 November 1918. In 1920, a law insuring employees against sickness was passed. The law required not only employees, but also their family members to be insured.

The state social protection system lays a foundation of social security for the population in case of social risks, and its main task is to reduce losses and their impact on an ability of people to provide the necessary life quality for themselves in each particular life situation. The main tasks of the social security system are to provide state social insurance and social assistance.

The security level of every socio-economic system is mainly characterised by the lifespan and quality of the population. A longer lifespan and a higher standard of living of the population indicate the security of a respective socio-economic system and vice versa – a shorter lifespan and a lower standard of living of the population indicate social tension and the insecurity of a socio-economic system. Therefore socio-economic systems and their security status lay a foundation of national security, the goal of which is to protect the population's political rights and freedoms, normal development of personality and society (Bergs, 2006).

Scientist J. Krūmiņš (Krūmiņš, 2008) pointed out in his studies that the population's expected lifespan can be analysed from two aspects. First, it is considered an average weighted value gained from life spans of separate population groups (men and women, urban and rural residents, regional residents, the dead by death causes etc.). Second, lifespan components can be analysed from a qualitative aspect. For instance, the length of life that is taken by the economically active period, the pension period, time period people have good health, number of years taken away by illnesses can be calculated.

According to Latvian Statistical Yearbook 2007 (2007), the expected lifespan of the population is 71.27 years (65.85 for men and 76.78 for women). There is a difference in the expected lifespan for urban and rural residents, i.e. 71.99 years in towns and 70.77 in rural areas.

In 1991 after Latvia regained its independence, the government had to start to think of creating a new political and economic system. The first years of independence wrecked illusions about fast economic growth. The transition to a market economy changed relations between the population and the state, increasing the role of people in socially protecting themselves and their families. It goes without saying that developing the model of Latvian social security system started soon after regaining the independence. Along with the economic reforms in the country, new laws regulating the social security were elaborated and passed, which was an instant reaction of the government to urgent and fast growing needs of the population.

In 1997, the elaboration of the Latvian Welfare Reform Project was completed and a loan contract between the Republic of Latvia and the World Bank was signed; as a result of it, Latvia received DEM 30 million to finance the introduction of this large project.

The Latvian Welfare Reform Project was implemented during 1997-2002. It included several welfare branches with the purpose of establishing a more economical and efficient social welfare system that would provide a possibility for protecting socio-economic rights and the health of every person.

In 1991, a social tax was introduced. The social security budget comprised payments of employers, employees, self-employed persons, government budget funds and other revenues.

In 1996, social tax payments were personalised, i.e. an insurance account, in which social tax payments were registered, was opened for each socially insured person.

In 1998, the law 'On State Social Insurance' came into force, which brought changes in the field of financing the social insurance. The term social tax was replaced by 'social security payments', thus addressing the principles of social insurance (Social Security Reform, 2008).

In a general case, the rate of social security payments when employers are protected by all kinds of social insurance remains unchanged since 2003, i.e. 33.09%, which is divided into two parts – the employer rate is 24.09%, while employees pay 9%.

In Latvia, the social security system includes state social insurance, state social benefits, social services, and social assistance that are based on financing from both the state basic budget and the state special budget, and municipal budgets.

Social insurance – a composite of measures organised by the state to insure persons or their dependents against the risk of losing income from employment due to insured persons' sickness, disability, maternity, unemployment, age, industrial accident, or occupational sickness, as well as against additional expenses due to child care and the death of insured persons or their dependents (Latvian Law on State Social Insurance, 1997).

One of the ways of guaranteeing the social security system is social transfers. The term 'social transfers' is mainly used in the field of social insurance, and it consists of two parts – 'social' and 'transfer'. To gain a more complete understanding of it, each component of the term has to be separately analysed.

The term 'social' originates from the Latin word societas, meaning society.

The term social is explained in the literature of various branches. The most popular ones are:

- related to society, human life, and relations in society; characteristic to them (Dictionary ot Foreign Words, 1999)
- related to social order, human relations in society; public (Dictionary of Latvian Language, 1987).

The term 'transfer' originated from the Latin word ***transferre***, a direct translation of it means to 'bear across, carry over'.

In the Dictionary of Foreign Words, the word 'transfer' is explained as follows: a money transfer from one financial institution to another or from one country to another (Dictionary ot Foreign Words Svešvārdu, 1999).

In the Economic and Financial Dictionary, the term 'transfers' means redistribution payments. Redistribution payments, transfer payments, and transfers, in their turn, are payments paid by the government to households – pensions, unemployment a.o. social benefits, state scholarships. They are not the government's reward for the supply of labour resources in a certain period of time (Economic and Financial Dictionary Ekonomikas, 2003).

The Economic Explanatory Dictionary explains the term 'transfer' as a money order or transfer. A money transfer is one of the types of money settlement operations used by legal and physical entities in order to make their payments. A money transfer can be carried out by a bank or a post office (Explanatory Dictionary of Economics, 2000).

The law 'On Budgetary and Financial Management' (1994) gives the following definition for the term 'transfer': a transfer is an annual transfer of budget funds especially prescribed in the State Budget Law, which can be done within one level budget – the state basic budget, the state special budget, the municipal basic budget, the municipal special budget – or among budgets of various levels. Transfer beneficiaries can use the received budget funds both for covering expenses and transferring them further to other transfer beneficiaries.

In the Central Statistical Bureau's (CSB) publication 'Household Budget 2004' and in the Latvian Statistical Yearbook (2004), the term 'transfers' is explained as follows – pensions, social security benefits, state social benefits, municipal social support benefits, alimonies, cash and material assistance from other households (Household Budget, 2004).

In her book 'The Budget of the Republic of Latvia: Yesterday, Today, Tomorrow', Doctor in economic sciences G. Rešina (2003) defines the term 'transfers' as follows: transfers are direct financial support in interbudgetary relations based on the legislative framework.

In the publication 'Income and Living Conditions in Latvia' (CSB, 2007), transfers are classified as follows: social transfers and private transfers (monetary support and alimonies from a person living in another household).

After compiling all the above-mentioned, social transfers can be defined as follows: social transfers are the government's temporary management of a part of the population's income, which provides incomes for particular population groups in social risk situations and in situations related to lowered incomes.

In Latvia, social transfers consist of state pensions and benefits. However, the system of benefits can be divided into three large groups, respectively, state social insurance benefits, state social benefits, and social support benefits, which are shown in Fig.1.

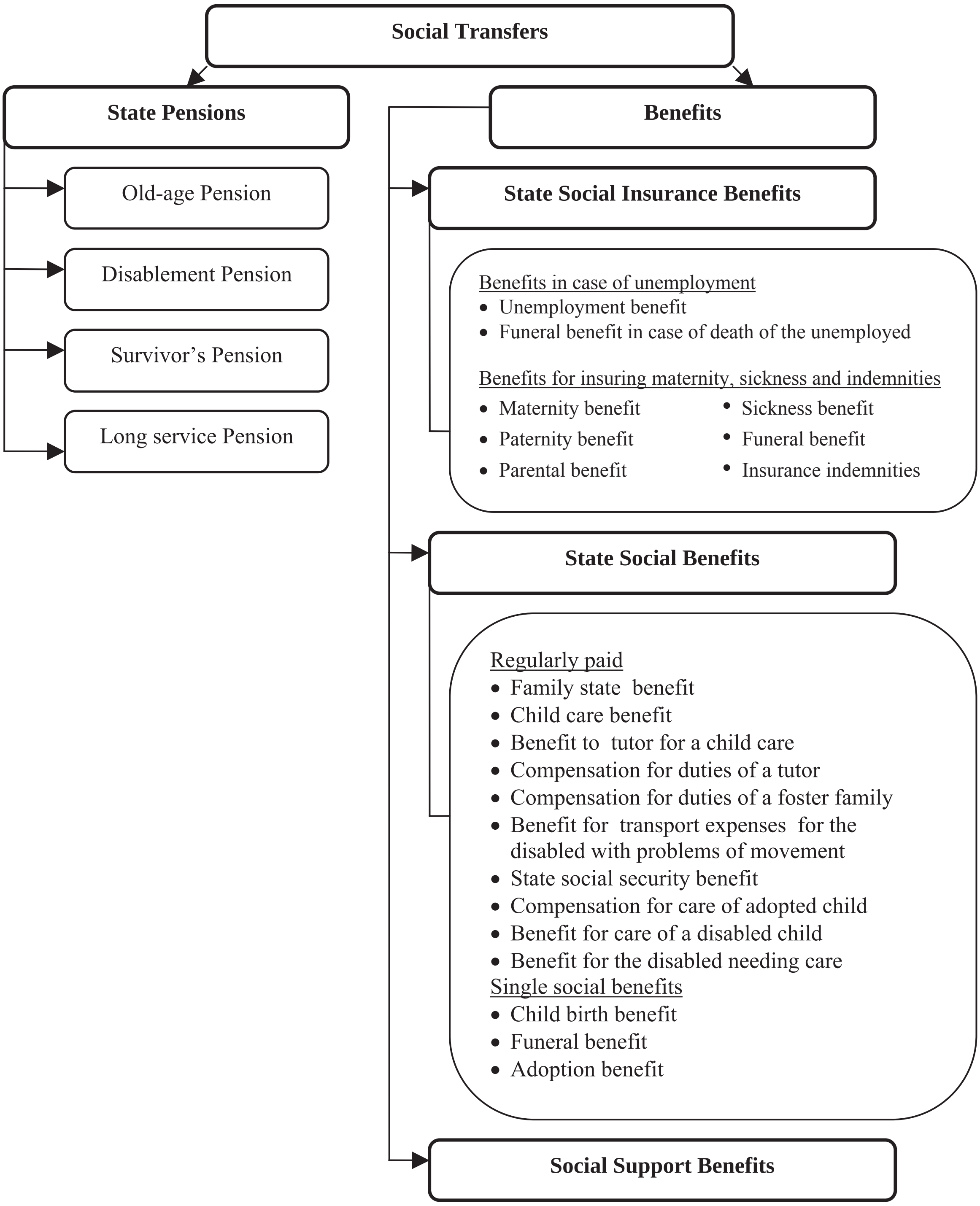


Figure 1. Types and a classification of social transfers in Latvia.
Source: developed by the author.

In general, the social security system is regulated in Latvia by the law 'On Social Security' (1995). It sets the principles of formation and operation of the social security system, the main social rights and obligations and their implementation conditions for persons, as well as regulates the types of social services, including social support and upbringing assistance, thus promoting social justice and social security.

The purpose of the law is to ensure that social services are rendered on time and institutions responsible for rendering these services are easily available.

When rendering social services, a different attitude is prohibited to persons due to race, ethnicity, skin colour, gender, age, individuality, health condition, religion, political and other views, national or social descent, material and family status, or other aspects.

To investigate the trends regarding social transfers, the author used the data of the SSIA from 2001 to 2007 (see Table 1).

Table 1

**Average Amounts of Social Transfers and Average Wages of Socially Insured Persons in Latvia during 2001-2007, LVL**

| Types of Social Transfers | Years | | | | | | | Average absolute increase | Average increase rate, % |
|---|---|---|---|---|---|---|---|---|---|
| | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | | |
| **All Pensions** | 59.41 | 61.4 | 63.44 | 69.71 | 78.86 | 93.11 | 107.16 | 7.96 | 10.3 |
| Old-age pensions | 60.65 | 62.92 | 65.19 | 71.66 | 81.3 | 96.39 | 111.57 | 8.41 | 10.7 |
| **State Social Insurance Benefits** Unemployment benefit | 40.54 | 42.48 | 51.02 | 57.06 | 63.92 | 78.81 | 107.19 | 11.11 | 17.6 |
| Funeral benefit in case of death of the unemployed | 100 | 98.17 | 90.86 | 104.92 | 105 | 134.58 | 135 | 5.83 | 5.1 |
| Maternity benefit | 297.3 | 326.79 | 384.97 | 479.01 | 557.48 | 647.1 | 830.25 | 88.83 | 18.7 |
| Paternity benefit | - | - | - | 77.39 | 83.98 | 103.98 | 131.93 | 21.99 | 19.5 |
| Sickness benefit | 79.92 | 86.45 | 96.55 | 109.61 | 121.77 | 144.48 | 175.68 | 15.96 | 14 |
| Funeral benefit | 196.36 | 170.62 | 213.14 | 218.03 | 206.63 | 293.1 | 328.77 | 22.07 | 9 |
| **Average Wage of Socially Insured Persons** | 145.36 | 154.57 | 172.32 | 191.84 | 219.92 | 273.93 | 364.55 | 36.53 | 16.6 |

*Source: author's estimates using SSIA data*

According to Table 1, one can conclude that the average amount of social transfers tends to increase, which is mostly related to an increase in the average wage of socially insured persons, as well as to changes in the legislation. The increase in the average wage of socially insured persons, in its turn, was impacted by an increase in the minimum monthly wage, an increase in the gross wages of employees, as well as by scrambling against the cash wages paid 'under the table' (Mistre et al., 2008). The greatest average absolute increase was observed for maternity benefits, which can be explained by an increase in the average wage of socially insured persons. To estimate a differentiation of social transfers among regions, as well as that of pensions and benefits between urban and rural residents, further studies are necessary.

**Conclusions**

1. Historically, the social security system began with mutual assistance organisations in England and France. Social insurance started emerging in the last quarter of the 19th century, and the first country that introduced it was Germany. The social security system of the Republic of Latvia started emerging right after the independence of Latvia was declared on 18 November 1918.
2. In Latvia, the social security system includes state social insurance, state social benefits, social services, and social assistance that are based on financing from both the state basic budget and the state special budget, and municipal budgets.
3. Any explanation of the term 'social transfers' is rarely available in Latvia. This term is only explained in a publication of the Latvian Central Statistical Bureau; therefore, the definitions are homogeneous and need to be improved.
4. In Latvia, social transfers consist of state pensions and benefits. However, the system of benefits can be divided into three large groups, respectively, state social insurance benefits, state social benefits, and social support benefits.
5. The average amount of social transfers tended to increase during 2001-2007, which can be explained by an increase in the average wage of socially insured persons, which, in its turn, was influenced by an increase in the minimum monthly wage.

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