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Global experience in providing social protection of population

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ABSTRACT

The aim of the article is to analyse the experience of providing social protection of population in the countries with socially oriented market economies for further implementation in Ukraine and other countries, which are in need of the social welfare reform. The need for social protection of population has been proved. It is noted that the modern social protection system should include a set of social guarantees, forms, methods and instruments of social assistance. The state's social expenditures in the countries that are members of the Organization for Economic Cooperation and Development are analysed. It is established that the social sphere of different countries is characterised by certain features of social welfare, which are caused by unequal level of state regulation and are reflected in relevant state policy. Basic models of social policy are described. The global experience of social welfare in the countries with socially oriented market economy is analysed. The main determinants of social protection of population in the world practice as well as measures, which contribute to the development of the social sphere are identified.

Keywords: social protection; social welfare; world experience; socially oriented economy; Social Insurance.

1. Introduction

The increase of social and economic risks which people face in the modern world (accidents, illnesses, unemployment, etc.) actualise the problem of forming the system of social protection of citizens, which is adequate to the new challenges and requires an increase of public attention to the problems of social protection of vulnerable sections of the population. Under present-day conditions, a socially oriented market economy has been built in many countries of the world. It requires attention to the level and quality of human life and the formation of appropriate accents for social reforms, adjustment of social standards and investments in human capital within the social policy (Biltan, n. d.; Ilchuk, n. d.; Vasechko, 2003, p. 37).

It should be noted that the modern social protection system should include a set of social guarantees, forms, methods and instruments of

social assistance (Hrynchyshyn, 2014, p. 300). The existing experience of the countries around the world is an important basis for further reforms in the field of social welfare and improvement of the corresponding processes. At the same time, in a number of countries, including Ukraine, there is a need for reforms in the social policy. Therefore, it is important to form and implement its own effective model of social protection of population.

The current global experience of forming the system of social protection of the population, especially in countries with a socially oriented market economy, is a serious material for study, analysis and adaptation for many countries. Therefore, the aim of the article is to analyse the experience of providing social protection of population in the countries with socially oriented market economies for further implementation in Ukraine and other countries, which are in need of the social welfare reform.

2. Literature review

The basis for the formation of social protection policy was described in the works of Hegel (1990), Kant (1994), Locke (1988), who determined the role of the state in ensuring the welfare of citizens. At different stages of the development of economics, different views relating to the reasonability of the state regulation of market processes have been formed. This also applied to social welfare. Thus, in the works of Petty (1992), Ricardo (1992) and Smith (1992), who are considered to be representatives of the classical school of economic theory, the need for state funding of only certain socially important needs is noted. Keynes (1992) emphasised the total state regulation of the economy. Hayek (1979), as a representative of the neoliberal direction of economic theory, supported the principles of economic freedom. He believed that the state should not deal with social insurance and provide social guarantees (the only exceptions may be old-age pensions and unemployment benefits).

Various models of the social policy are proposed in modern scientific works. They are classified according to certain characteristics. They take into account the strategic directions of the social policy and contain social values that are inherent in the national social protection systems. Thus, the British sociologist Titmus (1974) identified the following models of the social policy according to the principle of distribution of the state's social assistance: marginal (social protection is ancillary and it is aimed at the poorest population), institutional-distributive (the state is socially responsible for the welfare of citizens) and intermediate (combines the features of the previous two and allows to change the strategy flexibly). Leibfried (1992) identified the following models of social protection on the principle of "family resemblance": Anglo-Saxon; "Bismark" (institutional) model; Scandinavian (modern); Latin coast (rudimentary). Esping-Andersen (1994) proposed the following models of the social state and, accordingly, the social policy: Scandinavian (social-democratic), continental-European (conservative), Anglo-Saxon (liberal). Supplementing the approaches of G. Esping-Andersen, Lorenc (1997) distinguishes four models: Scandinavian (condition of implementation is in the employment provided by the state), residual (state social assistance is aimed at the low-income population), corporatist (delegation of responsibilities for social protection to professional, religious or charitable organizations) and rudimentary (social functions are mainly performed by non-governmental

organizations). Sapir (2005) distinguishes the following social models: northern (with a high level of social protection and universal nature of assistance), Anglo-Saxon (universal in exceptional cases), continental (the amount of social benefits depends on the amount of contributions paid by the employee) and Mediterranean (with a predominance of pensions in social costs and significant differentiation of beneficiaries depending on the status).

Today a certain system of social protection of the population is formed and functions in each country. However, Goldenberg (2002), Deacon (2001), Epstein (2002), Hudson and Williams (2001), as well as Leibfried (1992) pay attention to the consideration of global processes in the formation of the national social policy. In turn, Weekers and Pijl (1998), Lorenz (1997) and other researchers emphasise the role of national characteristics in the formation of social protection system and the implementation of relevant programs. However, taking into account the changes in the social policy that have taken place over the last decade in the countries with socially oriented market economies, the problem of reforms in the field of social protection and the transformation of relevant models need further analysis and consideration.

3. Methodology

General scientific and specific for economics approaches, methods and techniques were used in the research, namely: monographs, system analysis, generalisation, comparative analysis was used to study the features of social welfare in different countries; method of instantiation and statistical analysis were used when analysing the state's social expenditures in the countries belonging to the Organization for Economic Cooperation and Development (OECD). The choice of the countries as objects of study was determined by the social orientation of the market economy.

The analysis of the state's social expenditures of the OECD countries shows that in the period of 2016-2018 they averaged about 20% of the GDP (Table 1). The top five countries in terms of social expenditures according to 2018 data include France (31.2%), Belgium (28.9%), Finland (28.7%), Denmark (28%) and Italy (27.9%). An increase in social costs (% of GDP) in 2018 was noted in Korea (4,72%), Latvia (2,53%), Lithuania (2,53%), Estonia (2,22%), New Zealand (1,61%), Norway (1,19%), Italy (0,71%), Ireland (0,7%), Iceland (0,63%) and Poland (0,48%).

Table 1: General and sectoral indicators of the Polish economy financial depth, 2007-2018, % of GDP

Country	Social Expenditure, % of GDP			Rate of increase, %	
	2016	2017	2018	2017	2018
Australia	17,8	...*	...	...	...
Austria	27,8	27,1	26,6	-2,5	-1,9
Belgium	29,2	29,2	28,9	0,0	-1,0
Canada	17,4	17,3	...	-0,6	...
Chile	11,0	10,9	...	-0,9	...
CzechRepublic	19,1	19,0	18,7	-0,5	-1,6
Denmark	28,7	28,1	28,0	-2,1	-0,4
Estonia	18,3	18,0	18,4	-1,6	2,2
Finland	29,8	28,9	28,7	-3,0	-0,7
France	32,0	31,8	31,2	-0,6	-1,9
Germany	25,1	25,1	25,1	0,0	0,0
Greece	25,7	24,8	23,5	-3,150	-5,2
Hungary	20,8	20,2	19,4	-2,9	-4,0
Iceland	15,1	15,9	16,0	5,3	0,6
Ireland	14,9	14,3	14,4	-4,0	0,7
Israel	15,5	16,0	...	3,2	...
Italy	28,3	28,1	27,9	0,7	0,7
Japan	...	...	...	...	...
Korea	10,5	10,6	11,1	1,0	4,7
Latvia	16,1	15,8	16,2	1,9	2,5
Lithuania	16,0	15,8	16,2	-1,3	2,5
Luxembourg	22,2	22,6	22,4	1,8	-0,9
Mexico	7,5	...	...	...	...
Netherlands	17,5	17,0	16,7	-2,9	-1,8
NewZealand	18,9	18,6	18,9	-1,6	1,6
Norway	25,7	25,3	25,0	-1,6	1,2
Poland	21,2	21,0	21,1	-0,9	0,5
Portugal	23,7	23,7	22,6	0,0	-4,6
SlovakRepublic	17,8	17,3	17,0	-2,8	-1,7
Slovenia	22,2	21,4	21,2	-3,6	-0,9
Spain	24,3	23,9	23,7	-1,7	-0,8
Sweden	26,4	26,1	26,1	-1,1	0,0
Switzerland	15,9	16,1	16,0	1,3	-0,6
Turkey	12,5	...	...	...	...
UnitedKingdom	21,2	20,8	20,6	-1,9	-1,0
UnitedStates	18,9	18,9	18,7	0,0	-1,1
OECD - Total	20,5	20,2	20,1	-1,5	-0,5

*Data not available.

Source: Source: Organization for Economic Cooperation and Development, https://stats.oecd.org/Index.aspx?datasetcode=SOCX_AGG.

4. Results and Discussion

It should be noted that the social spheres of different countries are characterised by certain features of social welfare, which are specified by the unequal level of state regulation and are reflected in the relevant state policy. The global experience proves the significant role of the state in the processes of forming the socially oriented market economy, which consists in the implementation of legislative, regulatory and

controlling influences aimed at forming effective social policy and social protection system.

It should be pointed out that the models of the social welfare state were the basis for the social policy in many countries. The models were proposed by Esping-Andersen (1994): Scandinavian (social-democratic), continental-European (conservative), Anglo-Saxon (liberal). They determined the features and strategic guidelines of the social welfare (Table 2).

Table 2: Models of social policy

Model Name	Countries of implementation	Features
Scandinavian (Social Democratic)	Denmark, Norway, Sweden, Finland, Holland, Switzerland	High level of social protection of citizens against misery, unemployment, poverty. The universal nature of state aid in the form of direct financial aid. The priorities of the state social policy include income levelling and total employment. It is characterised by a significant fiscal loading on the labour market (Antropov, 2005, p.72; Bolotina, 2005)
Continental European (Conservative)	France, Germany, Belgium	Reduction of state intervention in the social policy and increase of the role of the non-state sector; development of partnerships between the state, the private sector, public and charitable organisations. Financing is at most moved from the state into the private sector and public organizations. Implementation of social programs for different occupational and status groups, depending on the paid contributions. Social assistance is proportional to the person's incomes and is satisfied by the possibility to compensate the risk of loss of incomes by means of insurance coverage (Hrynychshyn, 2014, p. 305; Servatynska, 2014, p.170)
Anglo-Saxon (Liberal)	USA, Japan, UK, Canada, Australia	Limited state intervention in the social sphere. Absence of universalism and targeting of social payments. Strengthening cooperation between the public and private sectors in implementation of social programs. Social assistance is provided at the expense of an advanced system of insurance for low-income population within the certain social needs. A compulsory condition for assistance is the inability of the individual to provide the means of subsistence (Hrynychshyn, 2014, p. 306; Servatynska, 2014, p.171; Ilchuk, n. d.)

Source: Source: formed on the basis of literature.

Global practice has shown that an effective system of social protection of the population in a democratic society is based on the effective interaction and cooperation of governmental structures, business sector and non-governmental organisations (Koval, n. d.). It should be noted that the main guidelines for social policy of the European Union (EU) countries are the following: ensuring the stable standard of living, increasing the employment rates, reducing income inequality, enhancing social protection and reducing poverty. At the same time, social insurance is one of the main instruments of the social protection system. The EU Charter of Fundamental Rights states that "anyone residing and legally moving within the EU is entitled to the social insurance and social benefits in accordance with the rules laid down in the Community law and national laws and practice" (EU Charter of Fundamental Rights, as cited in Opryshko, Omelchenko and Fastovets, 2002, p. 34).

Germany is one of the EU countries where social insurance has been most developed and is introduced in the classical form. The following types of insurance contracts are supposed in this country (Vasechko, 2003, p. 38; Pavlenko, 2002, p. 39; Bezuhla, Zahirniak and Shapoval, 2011; Nadochii, 2003, p. 22):

- state health insurance (provided by the state health authorities). A compulsory voluntary health insurance system, which is used by the majority of the population, is practically independent of the state budget and operates auto-

nomously. The contributions vary depending on the solvency of the insured persons, and health services are provided according to the state of health, regardless of the amount of insurance payments;

- state compulsory insurance against the need for care due to illness or old age (provided by the state medical insurance funds);

- pension insurance (is implemented by the land or federal insurance companies to the employees). There is a dependence of pension payments on the level of labour income of all insured persons before the retirement age, on the level of labour income of the insured person during his/her employment and length of service. There are four types of retirement pensions: ordinary pension; retirement pension for persons with long length of service; pensions for old-age and disabled persons; pensions for miners with significant underground work experience. An important supplement to the state pension insurance is the "enterprise pension", which many companies pay voluntarily to their employees as additional benefits upon reaching the old age;

- unemployment insurance (guaranteed by the Federal Office of Labour);

- state compulsory occupational accident insurance.

It should be noted that the German social insurance system is based on the certain principles. Among the main ones there are the following (Sukhanova, 2011; Stepanova, 2016, p.78):

- the principle of compulsory insurance. Insurance deductions are compulsory for all categories of employees, regardless of their incomes;
- financing through contributions (insurers and insured persons);
- the principle of solidarity – all persons insured equally, regardless of the amount of insurance premiums;
- the principle of self-government provides for the funds functioning according to the system of self-government (legal, financial and organisational independence from the institutions of public administration), as well as their full responsibility for their activity;
- the principle of free movement provides for the right of free movement of persons through the EU countries, regardless of the place of work;
- principle of equivalence means that the payments at the time of the insured risk are equivalent to the contributions that were before the risk (it is used when calculating the pension).

However, taking into account the principle of self-government, it should be pointed out that one of the main functions of the state is the creation of the legal framework and control over the activities of social protection bodies. The whole set of social protection regulations are consolidated in the Social Code.

Financing of the social protection system in Germany is carried out by means of contributions from the insured persons and employers or the state budget, as well as by means of the combination of both. The state is the guarantor of the fulfillment of the social obligations; it redistributes the part of the funds to cover expenditures in the form of state subsidies.

General social insurance, which includes all the residents, regardless of occupation, forms the basis of social protection policy in Sweden. At the governmental level, it is stated that the state should provide economic protection to the person in case of illness, medical care, childbirth and old age (general insurance), and in case of industrial accidents or vocational illnesses (accident insurance) and unemployment (Karlin and Borysiuk, 2013). Social insurance funds are financed through the payments made by the employers, self-employed persons, insured persons, as well as shares of state funds and tax revenues. A number of financial payments of social insurance are fully funded by the central government (Malovanyi, 2011, p. 254). Social insurance in Sweden provides for the following (Sukhanova, 2011):

- health insurance – covers almost the entire list of standard health care services. It is mainly funded by the public funds. It allows to com-

- pensate for the major part of medical costs;
- unemployment insurance – is carried out through cash registers organised by the trade unions. They operate throughout the country and include certain professional categories;
- system of national pensions – includes basic (national), supplementary (labour) and partial (incomplete) types of pensions. The pension system is still in solidarity, but in the future the amount of pension will depend on the amount of payments.

Generality is also typical for the national insurance system of the UK. A single social protection program that covers all social insurance programs is its feature. Therefore, there are no special institutions in the country that deal with the insurance of specific types of social risks. Insurance premiums paid by the employees and employers are not differentiated by the designated use. Financing of social protection system in the UK has the following specific features (Bezuhla, Zahirniak and Shapoval, 2011):

- national health care accounts 90% of the budget. The health insurance system is state-owned and highly centralised;
- national social insurance is carried out from the insurance payments of the employees and entrepreneurs.

It is important to point out the significant role of the UK public authorities in providing social protection, which distinguishes it from most countries, where the importance of public organisations in the social service of citizens is increasing. However, it provides a high level of quality of social services as well as the proper and timely financing. In addition, determining the needs of the population for social services, monitoring their quality takes place at the local level. This actualises the relevant indicators and allows for adjusting them in time. Therefore, we believe that such experience is noteworthy.

Social protection in France is based on insurance and includes pensions, unemployment benefits, family and housing aids, as well as employment assistance. It should be noted that the social protection system in France is characterised by the features of the continental model. Social insurance offices, which are responsible for a particular type of social protection, carry out social protection control at the national and regional levels. Social insurance offices (both at the regional and local level) operate on the basis of self-government. Each of them has its own board, which consists of the representatives of the insured persons and employers. Offices are managed by the Ministry of Social Affairs, Labor and Solidarity. All

national offices are managed by the Central Agency for Social Welfare. It also controls their expenditures (Karlin and Borysiuk, 2013, p. 38). Payments of workers and employers (with the exception of unemployment insurance and family benefits, where the share of government subsidies is higher than in other social welfare sectors, as well as accident insurance, which is financed solely by the employer) are the main sources of social protection funding in France. Among the main features of the French system of social protection of the population, researchers pay attention to the following (Berezin, Bezpartochnyi and Nikilieva, 2013, pp. 50-51):

- an extensive system of occupational sectoral schemes of social insurance;
- a developed system of family payments,
- a significant role of supplementary social protection systems, especially in the field of pension and health insurance;
- introduction of decentralisation in the field of social services, which is increasing the importance of private (non-profit) organisations. They take initiatives to the government and manage the provision of social services by means of financial support of state bodies.

However, we believe that the complexity of the organisational structure, built on the principle of hierarchy, complicates the implementation of such a system.

Social protection in the Netherlands is represented by the systems of social insurance and social assistance. Social insurance is carried out in two organisational and financial forms:

- state insurance exists for the entire population of the country (pension, loss of the breadwinner, disability). Contributions are paid directly by the insured person. State insurance assistance can be provided both in cash and naturally (vacation packages, boarding houses accommodation);
- Employee insurance - contributions are paid by employers and employees by means of the wages fund. Contributions are collected by the industry insurance associations, managed by employers' and employees' representatives (Polde Noier, 1999, p. 30).

Providing citizens with minimum income is consolidated at the legislative level. Therefore, social assistance is awarded under the following conditions: in case of emergency (it is provided by municipalities); in cases when insurance payments are less than the guaranteed income (it is provided by the industrial insurance companies). In general, the legislation of the Netherlands defines the following types of social assistance: child support; additional assistance to the unemployed and disabled

persons; assistance to the aged and partially disabled persons; assistance to the unemployed persons; assistance to wage workers (Polde Noier, 1999, p. 28).

Insurance premiums, which are paid in equal parts by the employer (in the case of work injury and occupational disease) and the employee (for old-age social insurance, in case of illness) are the main sources of financing of social insurance funds in Poland. The Institute for Social Insurance, a state organisation with legal rights, collects approximately 50% of state budget expenditures, benefits and pensions (Yarova, 2012, p. 123). An addressed cash assistance system is implemented in Poland. The main functions related to the organisation of social welfare (identification of persons, assistance awards and payments), formation of the legal framework, development and implementation of the relevant programs are considered to be the prerogative of public authorities at various levels. However, non-governmental organizations are involved in the implementation of certain functions in the social welfare system.

The US social welfare system is implemented in different areas of social insurance and social assistance. They have various sources of funding. It should be noted that there is no single national social insurance system in the country. Employees and entrepreneurs pay the appropriate taxes that form insurance funds. Payments are made from these funds. In addition, researchers (Biltsan, n.d.; Voytenkova and Lebedeva, 2007, p. 100) point to a very sophisticated system of corporate, individual insurance or paid services. There is a significant number of private (commercial) social organisations (agencies) funded through the charitable contributions and governmental funding for certain programs. Pension insurance is divided into public and private (it is highly developed and widespread). In this case, pension funds are widely attracted in the form of investments in the national economy. Scholars (Malovanyi, 2011, p. 254; Sukhanova, 2011) point out rightly the peculiarities of the social insurance system in the health care sector. Namely, the fact that voluntary and private insurance successfully supplements public health funding. It allows providing additional medical services, expanding sources of financing for industry development. State aid is paid exclusively from the budget funds: the federal budget, state budgets or local authorities. It should be noted that the formation of the social welfare system in the United States is based on the policy approach. Its implementation involves the realisation of various programs, which are regulated at different levels of government (federal, state or

local). In our opinion, this approach is noteworthy. As it allows providing a clear definition of the basic tasks and means of realisation.

Social welfare in Japan is provided to support citizens in case of temporary or permanent disability and it is based on insurance. At the same time, financing is provided at the expense of insurance payments of the population, employers, as well as public funds. Japanese social welfare system is implemented in the following areas: pensions and health insurance, childbirth cash payments, nursing care, and funeral costs. It should be pointed out that the Japanese pension system includes the following elements:

- employment insurance at the place of work – both workers and employers pay insurance premiums. It is provided for retirement payments in case of disability and loss of breadwinner;
- insurance at the place of work of certain categories of workers is provided by mutual aid companies.

Health insurance is mainly financed through the special funds. Researchers [Feschenko and Nuykina, 2006; Malovanyi, 2011, p. 256] distinguish two effective insurance systems in this area: the Employment Insurance System (production feature) and the National Life Insurance System (domiciliary), which cover the vast majority of the population.

5. Conclusions and discussion

Global practices in the field of social protection of the population of the countries with socially developed market economies prove that the social sphere is one of the priority directions of the public policy.

The effective system of social protection of population is based on the efficient interaction

and cooperation of state structures, business sector and involvement of public organisations. The level of such interaction depends on the model of social policy, chosen as the basic one. However, it should be noted that the most effective tools inherent for different models are often used to maximise the benefits and to level the disadvantages. This creates additional opportunities for improving the effectiveness of social policy, taking into account the current challenges and strategic social welfare guidelines.

The study of the experience of the countries with a socially oriented market economy has revealed that the main guidelines of their social policy are the following: ensuring a stable standard of living, increasing the employment level, reducing income inequality, enhancing social protection and reducing poverty.

Social insurance is considered to be one of the main tools of social protection system. It should be emphasised that studying the positive world experience of social protection of the population and its adaptation to the conditions of the countries, where the social policy requires modern reforms (especially with the transformational economy), will allow forming the modern and effective basis for making effective state policy in this sphere.

Ukraine should pay attention to the world experience and global trends in this field. This will allow us to consider alternative ways to reform the social protection system and form our own modern model of social welfare. However, it should be noted that implementation of the experience requires an appropriate adjustment of the legal framework, reformation of the social services institution, adjustment of mechanisms for implementation of state policies in the field of social services. These directions form the prospects for further research.

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