

ЕКОНОМІКА ТА УПРАВЛІННЯ НАЦІОНАЛЬНИМ ГОСПОДАРСТВОМ

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SOCIAL MINIMA AND THEIR ROLE IN THE FORMATION OF HOUSEHOLD WELFARE IN UKRAINE**СОЦІАЛЬНІ МІНІМУМИ ТА ЇХ РОЛЬ У ФОРМУВАННІ ДОБРОБУТУ ДОМОГОСПОДАРСТВ В УКРАЇНІ**

Urgency of the research. Social benefits are crucial in the income structure of households in Ukraine, so investigates the impact of social minima sizes on the development of national economy are urgency.

Target setting. The low level of supply of material and spiritual needs of the citizens of Ukraine is the result of ineffective social policy, including catastrophically low levels of social minima. In recent years, the share of total households spending on education, culture and recreation is rapidly falling and the share of food increases. This indicates a negative reformatting the structure of their expenditure on the background of nominal growth in household incomes.

Actual scientific researches and issues analysis. Domestic scholars E. Libanova, I. Prodanova, B. Sizonenko, S. Melnyk, V. Mykytenko, T. Kizyma, A. Kovtun and others studied income and expenditure of households in Ukraine and economic assessment of their levels in recent years.

Uninvestigated parts of general matters defining. The analysis of sources of household income formation still remains an unresolved and poorly studied problem.

The research objective. There were set of the following objectives: to define the relationship between the level of household expenditure on education, culture and recreation and the level of social minima; to determine the effect of inflation components on the level of social minima in Ukraine; to substantiate a new indicator of household.

The statement of basic materials. The dependence of the structure of households welfare in Ukraine from the nominal size and growth of social minima, taking into account inflation have been investigated. The trends in restructuring of households welfare expenditures depending on the size of social minima and the national currency have been established. The percentage of expenditure on education, culture and leisure in the structure of total household expenditure is proposed to be considered as an indicator of households welfare.

Conclusions. The survey results give reason to suppose that the nominal growth of social minima is the most effective one in case of sustainable slight advance of social minima growth comparing to inflation growth rate. A significant and prolonged lag of growth rates of these indicators from inflation rates and falling of the national currency is launching the mechanisms of economic stagnation, the banking system crisis.

Актуальність теми дослідження. Соціальні виплати є визначальними у структурі доходів домогосподарств України, тому дослідження впливу розмірів соціальних мінімумів на розвиток національної економіки є актуальним.

Постановка проблеми. Низький рівень забезпеченості матеріальних та духовних потреб громадян України є наслідком неефективної соціальної політики, зокрема катастрофічно низьких розмірів соціальних мінімумів. Протягом останніх років частка сумарних витрат домогосподарств на освіту, культуру та відпочинок стрімко падає, тоді як частка продуктів харчування зростає. Це свідчить про негативне переформатування структури їх видатків на фоні зростання номінальних доходів домогосподарств.

Аналіз останніх досліджень і публікацій. Дослідженням доходів і витрат домогосподарств України та економічним оцінюванням їх рівнів протягом останніх років займалися вітчизняні вчені: Е. Лібанова, С. Мельник, В. Микитенко, І. Проданова, В. Сизоненко, Т. Кізіма, О. Ковтун та ін.

Невирішеною та мало дослідженою проблемою залишається аналізування джерел формування доходів домогосподарств та роль соціальних мінімумів у їх величині.

Постановка завдання. У статті було поставлено завдання: встановлення залежностей між рівнем витрат домогосподарств на освіту, культуру та відпочинок та величиною соціальних мінімумів; визначення впливу інфляційних складових на рівень соціальних мінімумів в Україні; обґрунтування нового індикатора добробуту домогосподарств.

Викладення основного матеріалу. Досліджено залежність структури видатків домогосподарств України від номінальних розмірів та темпів росту соціальних мінімумів з врахуванням інфляційних процесів. Встановлено тенденції у зміні структури видатків домогосподарств залежно від величин соціальних мінімумів, а також курсу національної валюти. Запропоновано розглянути в якості індикатора рівня добробуту домогосподарств сумарний відсоток витрат на освіту, культуру та відпочинок у структурі їх сукупних витрат.

Висновки. Результати дослідження дають підстави вважати, що номінальне зростання соціальних мінімумів є найбільш ефективним у випадку стабільного незначного випередження темпів росту мінімумів порівняно з темпами інфляції. Значне і затяжне відставання темпів росту зазначених показників від темпів інфляції запускає механізми стагнації економіки, кризи банківсь-

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Keywords: *social minima; living wage; minimum wage; household; household income and household expenditure structure; the consumer price index; real wage.*

кої системи.

Ключові слова: *соціальні мінімуми; прожитковий мінімум; мінімальна заробітна плата; домогосподарство, структура доходів та витрат домогосподарства; індекс споживчих цін; реальна заробітна плата.*

Urgency of the research. Today in Ukraine an inadequate level of welfare of the average household is set, in the structure of which social benefits make up the bulk, which justifies the relevance of research in social minima in Ukraine and their impact on the development of entire national economy.

Target setting. The problem of poverty in Ukraine is one of the most difficult issues of social and economic development of the national economy and is directly related to the ineffective and, in some cases, to criminal social policy. This problem is especially exacerbated in the study of household welfare in Ukraine, where the levels of social minima, including minimum wage and living wage are catastrophically low.

Actual scientific researches and issues analysis. Domestic scholars O. Alymov [1], Y. Bolotin [2], E. Libanova [1; 3], C. Miller [4], V. Mikitenko [5], I. Prodanova [6], B. Sizonenko [7] and others studied income and expenditure of households in Ukraine and economic assessment of their levels in recent years. Publications of T. Kizyma [8] and A. Kovtun [9] were devoted to financial behavior of households. Despite all the diversity of views and opinions of these authors, scholars are unanimous about the fact that in terms of transformation of the national economy into the market one, households become an important subject of market relations, which is also a potential investor and the end user.

Uninvestigated parts of general matters defining. However, the analysis of sources of household income formation still remains an unresolved and poorly studied problem, as these sources are the basis for ensuring the appropriate level of expenditure.

The research objective. In order to study the welfare of households in Ukraine and to determine the role of social minima in their formation, there were set of the following objectives: 1) to define the relationship between the level of household expenditure on education, culture and recreation and the level of social minima; 2) to determine the effect of inflation components on the level of social minima in Ukraine; 3) to substantiate a new indicator of household welfare in terms of socio-economic crisis.

The statement of basic materials. The household in the market economy takes an active part in the creation of national product, the supply of economic resources, consumption of goods and services that, as considered by the authors of works [2; 5-7], has no less impact on the economic welfare level than other elements of the economy. The household in the structure of the national economy serves, according to the authors of works [8-10], as a subject of economic relations, and in the course of its economic activity enters financial relationships. Today there is observed a sharp increase in household expenditure on livelihood support (food, utilities, etc.) and a sharp reduction in expenditure on education, recreation and cultural needs satisfaction. Investigation of the structure of household expenditures, including spending on education, recreation and satisfaction the cultural needs is described in the work [11], where the authors justify this low state by low level of minimum wage and living wage, which is directly connected with social policy.

Social policy in Ukraine has a post-Soviet character. The country has an inefficient payroll system, scholarships and pensions and relative social guarantees through the provision by state agencies of exemptions and subsidies. Such a system does not encourage citizens to develop their professional skills, willingness to work efficiently and causes mass emigration of educated and skilled workers, prosperity of corruption and bribery, lack of motivation to improve education, inability to join the cultural processes and recreation due to low income. In recent years a rapid fall of population savings was the consequence of the current situation in the social sphere, which was an alarming trend for the state financial system stability.

As assumed in scientific sources [1; 3; 12-16], social policy of the state is a set of socio-economic measures aimed to protect people from unemployment, rising prices, the depreciation of labor savings, guarantee minimum income for members of society; to support and develop the abilities of society members, including the ability to work; to provide citizens with a reasonable level of social ser-

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vices. Basic provisions of the policy are laid down in the Constitution. Also, state agencies are committed to their citizens by signing international agreements, declarations, charters etc.

Paragraph 1 of Article 4 of the European Social Charter [17] recognizes the right of workers to a remuneration that will give them and their families a decent standard of living. There is stipulated that the family as a fundamental unit of society has the right to appropriate social, legal and economic protection to ensure its full development. In Ukraine the Charter was ratified with statements by the Law № 137-V (137-16) of 14.09.2006 and came into force on February 1, 2007. This meant that Ukraine undertook the responsibility to implement not all articles and provisions of the Charter. Parliament did not ratify three of the nine compulsory articles despite the existence of similar ones in the Constitution of Ukraine, in particular Article 46 (right to social security). The above paragraph of the European Social Charter was formulated in Ukrainian amended version as follows: "to recognize the right of workers to compensation, which guarantees them and their families a decent standard of living." A decent standard of living in the Constitution of Ukraine includes "adequate food, clothing and housing" [18]. Such significant reduction of obligations led to the fact that in March 2016 the Cabinet of Ministers of Ukraine adopts A poverty reduction strategy [19], where, in particular, is stated the fact that in 2015, below the relative poverty line according to expenditure were 23.8% of the population, the poor among working people there were 18.8%, and the scale of shadow income, according to various experts, ranged from 40 to 60 percent.

One of the main trends, challenges and ways to implement the Strategy in [19] are recognized:

- Introduction of new approaches to minimum social standards and guarantees formation, including a living wage, according to international practice, including EU countries;
- Raising the minimum wage as a result of improving the mechanism of its determination and guarantees of providing in accordance with international practice and the provisions of International Labour Organisation Convention number 131 on Minimum Wage Fixing in developing countries;

Social policy aims, in particular, to ensure: required minimum consumption, housing, improving education and culture level, and guarantee family support. The economically inactive population needs, obviously, the most of social protection. In 2015 in Ukraine it numbered 10,925,500 people, including pensioners 53.3%, students and pupils 22.3%. General demographic burden per 1,000 population aged 15 - 64 years in the same year was 443 (in 2011 - 419 people).

The current situation of incomes in Ukraine does not allow limited concern about redistribution of national income from the overwhelming majority of citizens with incomes above the average to the economically inactive population or low-paid unskilled workers. The problem is that in Ukraine most of employed people (including the educated and skilled) have incomes that do not allow meeting the basic needs of their own and their families'. According to statistics [20] In January - April 2016 the average salary of full-time employees amounted to 4,984 UAH. Only 27% of staff received more than 5,000 UAH per month on average. 33.9% of full-time workers received less than 2,500 UAH and 3.1% of workers receive wages lower than 1,378 UAH, that is less than the living wage minimum for working age people. That is why today in the scientific sources [3, 4], which study social and economic development of Ukraine, the use of the term "poverty of the working population" gets widespread.

According to the Social Report for 2015 [21] published by the Ministry of Social Policy, the share of wages in population income structure in 2015 was only 39.0% (compared to 2011 51.83%). Revenues in the form of profits and mixed income accounted for 18.3%, income received from property - 4.9%, and social benefits and other current transfers - 37.8% (in 2011 - 20.88%). The data states the fact that the principles of calculation of wages in Ukraine are ineffective and lead to the need of subsidies for skilled working age population. Only in December 2015 of 4.6 million households received a subsidy according to the simplified system, that is in 4 times more than in December 2014 (1.1 mln. households) This situation does not allow to formulate citizens' needs in professional skills, level of education and productivity development, which has extremely detrimental effect on the process of Ukrainian economic development. Various social benefits and subsidies can only temporarily hold back the rapid impoverishment of the population. The low pay for skilled labor – it is a road to nowhere, as the basic principle of market economy is not implemented – it is the ability of self-sufficiency.

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Social policy pursued by the Cabinet of Ministers of Ukraine during the existence of our independent state is based on so-called social minima: minimum wage, minimum pension, living wage and so forth. It is well known that social minima are the base for wages, pensions, scholarships and other social benefits calculation. The basis for the subsistence minimum calculation is the consumer basket. Its qualitative and quantitative composition and method for its components evaluation becomes increasingly irrelevant to the minimum needs of the modern citizen. The above irrelevance escalates the most in 2013 – 2016 that is clearly illustrated in [21]. Table 1, which shows the dynamics of average values of the minimum wage and living wage per year, traces slight increase of these values, but the dynamics of the index of real wages is decreasing. Index of real wages characterizes the change in the purchasing power of wages in the reported period compared to the baseline [22].

Table 1

Dynamics of the minimum wage and living wage index of real wages

Years	Index of real wages	The average annual cost of living, UAH	Average annual wage, UAH
2010	1.105	848.60	890.00
2011	1.110	923.00	972.50
2012	1.110	1050.60	1104.20
2013	1.068	1142.00	1182.20
2014	0.865	1176.00	1218.00
2015	0.901	1227.00	1298.00
2016	0.846*	1388.50	1388.00

Note: * - the calculated values for the first half of 2016

Source: Built on materials by State Statistics Service of Ukraine [20]

The calculation takes into account the consumer price index of the current period compared to baseline by dividing it in the index of accumulated nominal wages "net" in the same period. Despite the legally allowed review of the consumer basket at least every five years, according to [23], which was adopted in 1999, the composition of food and non-food products and services has not been changed and has not been revised for over 17 years.

Thus, with full reliability it can be stated that social and economic policy of the state does not meet the standards established not only in the world, but in Ukraine, which does not provide not only a decent standard of living, but even its vital needs in health care, recreation, sports, education, access to communication tools, and so on.

Social living standards remain low throughout 2016, despite the approved Law [24] on new dimensions of social minima, where the value of the living wage minimum for a working age person, and the minimum wage is set at 1,378 UAH per month (for the period 01.05.2016 - 30.11.2016). Rising of living wage for a working age person by 12.3% and the minimum wage by 10.6% respectively are not able to brake the rapid impoverishment of the population. These minima, in our opinion, do not meet the inflation processes in Ukraine and are only doomed to deepen the negative effects on the path of socio-economic development: corruption, bribery, loss of productivity and quality of work, a significant reduction of education and science level, braking of cultural development, and so on.

The social report for 2015, released by the Ministry of Social Policy of Ukraine [21], shows that for the last year prices for food and soft drinks increased by 41.5%, alcoholic beverages and tobacco products - by 22.7%, clothing and footwear - 35.0%, housing, water, electricity, gas and other fuels - in 2,0 times, furnishings, household equipment and routine maintenance of housing - by 36.0%, health care - at 29, 1%, transport - by 20.4%, communications - 7.0%, recreation and culture - by 37.9%, education - 24.2%, restaurants and hotels - by 23.3%, various goods and services - 31.4%. This made the specialists of the Ministry of Social Policy of Ukraine [21] publish in the mentioned report the actual value of the monthly living wage minimum in 2015 for the working population, the average of which is 2,361 UAH., that is on 71.3% higher than established minimum wages in 2016.

As an economic unit, reflecting the state of socio-economic development of the national economy, it was selected household that with its structure of revenues and expenditures, as grounded in scien-

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tific sources [6, 11], is both a major consumer of goods and services and factor productions. Their number in Ukraine is 17.6 million. And the average size is 2.58 people (2014) [25].

The low expenditure on education, culture and recreation compared to total expenditure of one household can be seen from Table 2.

Table 2

The dynamics of aggregate expenditure of one household during 2005-2015

Years	Total expenditure of one household, UAH	Expenditure on education of one household, UAH	Expenditure on culture and recreation of one household, UAH
2005	1325.80	11.93	30.49
2006	1591.20	20.69	36.60
2007	1829.30	27.44	38.42
2008	2639.30	31.67	52.79
2009	2828.70	31.12	33.94
2010	3153.10	34.68	59.91
2011	3424.30	44.52	41.09
2012	3660.20	36.60	51.24
2013	4108.48	49.30	65.74
2014	4409.77	35.28	57.33
2015	6341.25	57.38	76.51
2016*	7394.926	55.03	71.22
2017*	9201.044	58.43	74.85

Note: * - Estimates for the first half

Source: Built on materials by State Statistics Service of Ukraine [20]

This is because, first of all, households satisfy their physiological needs in food, clothing and paying utility bills and other expenditure is made in case of the balance is enough after basic needs are met. In these works [6, 11], exploring the principles of income and expenditure of households formation, the authors do not touch the prediction of these processes, so this necessitated a trends building (Fig. 1) and the calculations of predictive values of these indicators for years 2016-2017 (Tab. 2) by the ranking models method explained in [26].

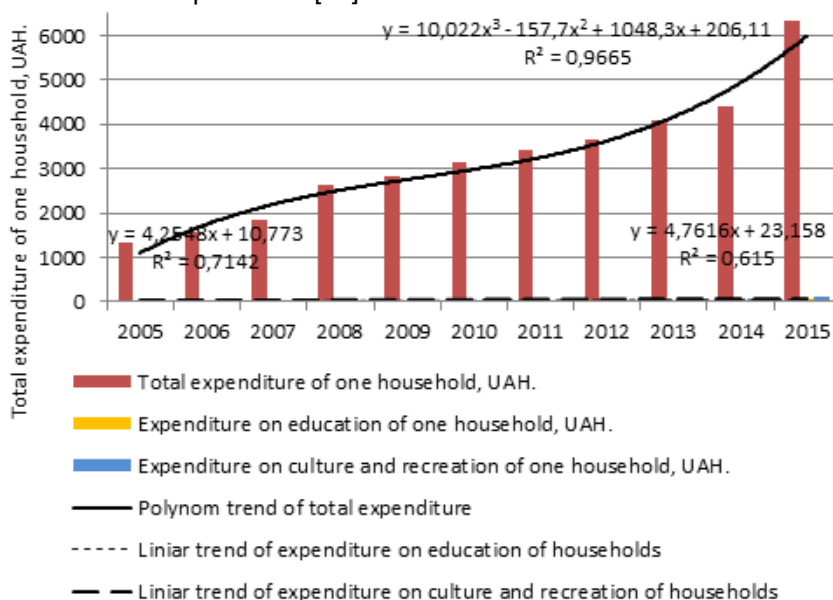


Fig. 1. Trending model of total expenditure and education, culture and recreation expenditure per household during the period 2005-2015

Source: Own calculation according to the State Statistics Service of Ukraine [20]

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As it can be seen from Table 2, expenditure on education, culture and recreation of one household in 2016 continues to fall and account for 55.03 UAH. and 71.22 UAH respectively, compared to a significant increase in total expenses (7,394.926 UAH.) in the same year, indicating for an opinion on their use in future research as one of the indicators of the welfare of households. We recommend using the total share of spending on education, culture and recreation in total household expenditure as an indicator, which is reflected in the following diagram (Fig. 2).

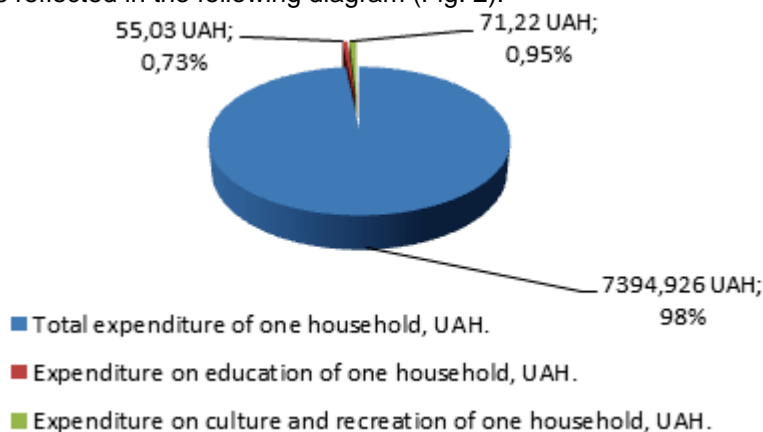


Fig. 2. Forecast of education, culture and recreation expenditure in total expenditure per one household in 2016

Source: Own calculations

After analyzing the composition of total expenditures and other comprehensive income of one household, we can see that the structure of the total expenditure varies depending on the structure of real income.

The rapid fall in expenditure on education, culture and recreation in total costs (Tab. 2), in our view, is a clear proof of the conclusion about the rapid impoverishment of the population, despite the steady growth of the value of total household expenditure and steady nominal growth of social minima (Tab. 1). In particular, the 2016 it is projected that the share of expenditure on education in total expenditure reaches unprecedentedly previously point in 0.73%, while the share of food products will be 65.5% (Fig. 2). One of the reasons of the described dynamics is, certainly, the change of the national currency. However, clear connection of such variables as average total household expenditure in dollar terms and the share of expenditure on education, culture and recreation is complex and incorrect to be proved (Tab. 3).

Table 3

The dynamics of socio-economic indicators in 2007-2015

Year	The average annual inflation rate	The average annual US dollar exchange rate, USD.	Inflationary growth Mines s / n,%	Inflationary growth living wage%	The share of expenditure on education,%	Share of culture and recreation expenditure,%
2007	116.60	5.02	2.02	-5.16	1.50	2.10
2008	122.30	6.74	0.56	-5.84	1.20	2.00
2009	112.30	8.01	2.37	-1.99	1.10	1.20
2010	109.10	7,93	37,81	18.84	1.10	1.90
2011	104.60	7.96	4.67	4.17	1.30	1.20
2012	99.80	7.99	13.74	14.02	1.00	1.40
2013	100.50	7.99	6.56	8.20	1.20	1.60
2014	124.90	11.89	-21.87	-21.92	0.80	1.30
2015	143.30	21.85	-36.73	-38.96	1.20	1.60

Source: Own calculation according to the State Statistics Service of Ukraine [20]

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The obvious conclusion is that the volume of minimum wage and living wage as a basic value for calculating of wages, pensions, scholarships and other social payments are major factors in the formation of household welfare level in modern Ukraine. A significant increase in the percentage of social benefits, pensions and other current transfers in the household incomes structure compared to the percentage of salary should become a serious signal for the government about the disastrous inefficiency and destructive for the existing social policy. The most paradoxical is the fact that educated and skilled workers, including employees of education and healthcare, in recent years are far below the average wage of full-time employees according to the kinds of economic activities.

Thus, in April 2016 workers of healthcare and emergency social assistance were stated on the last step of the scale. Their average wage was 223% of the living wage minimum for working people (62.7% of the average in the national economy), that is 3,070 UAH, equivalent to US \$ 122,8. Wage of education workers was on the third position from the end and was 244% of living wage minimum (68.7% of the average in the national economy), that is 3,362 UAH, equivalent to US \$ 134.4 [20]. Wages of employees of these areas are directly related to the established social minima, as health and education in Ukraine are financed from the state budget.

It is logical to formulate the question of the reasons of that during the sustainable growth of the nominal value of the living wage and minimum wage (Tab. 1) there is a rapid impoverishment of large part of the population of Ukraine, especially the educated and skilled people, significant drop of the actual level of household welfare (Tab. 2) and, consequently, reformatting of their costs structure, including significant reduction in education, culture and recreation expenditure.

One of the reasons of this trend is an inadequate growth of social minima according to the rate of inflation caused by internal factors as well as the depreciation of the national currency (Tab. 3).

Conclusions. The survey results give reason to suppose that the nominal growth of social minima can provide sufficient household income only in case of the adequacy of their rate of growth to the inflation index. The principle of sustainable slight advance of social minima growth comparing to inflation growth rate is the most effective one. A significant and prolonged lag of growth rates of these indicators from inflation rates and falling of the national currency is launching the mechanisms of economic stagnation, the banking system crisis, work productivity and quality reduction, the abroad outflow of skilled working population, corruption and bribery flourishing. The prospect of further research is building of economic and mathematical model of the impact of socioeconomic factors on the welfare level of households in Ukraine using modern fuzzy logic and fuzzy sets apparatus.

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