



EUROPEAN SOCIAL POLICY NETWORK (ESPN)

# National monitoring frameworks for public social spending

## Malta

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Social Europe

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National monitoring frameworks  
for public social spending**

**Malta**

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**CONTENTS**

- SUMMARY ..... 4
- 1 COUNTRY-SPECIFIC MONITORING FRAMEWORKS FOR PUBLIC SOCIAL SPENDING..... 5
  - 1.1 Country-specific dedicated monitoring framework(s)..... 5
  - 1.2 Separate monitoring framework(s) linked to schemes provided by employers ..... 6
  - 1.3 Distinction between current expenditure and capital expenditure..... 6
  - 1.4 Type of monitoring: level and outcomes ..... 6
  - 1.5 Level of granularity of public social spending ..... 7
  - 1.6 Breakdown of public social spending ..... 7
  - 1.7 Timing and public accessibility of data..... 7
  - 1.8 Sub-national frameworks ..... 7
- 2 REPORTING/REVIEW TOOLS FOR PUBLIC SOCIAL SPENDING ..... 7
  - 2.1 Introduction..... 7
  - 2.2 Anti-poverty strategy ..... 8
  - 2.3 2020 pension reform evaluation ..... 8
  - 2.4 Occasional research papers ..... 8
  - 2.5 Action as part of Malta’s Recovery and Resilience Plan ..... 9
  - 2.6 Participation in EUROMOD ..... 9
  - 2.7 External support through the World Bank: rebalancing of the Social Safety Net programmes..... 10
  - 2.8 The National Plan under the Council Recommendation on Access to social protection for workers and the self-employed..... 10
- REFERENCES ..... 12

## Summary

Malta does not have an integrated framework for monitoring public spending specifically on social programmes, either on a regular or ad hoc basis. However, monitoring and auditing of public spending as a whole, including social spending, is an essential component of the work of the Ministry of Finance (MF), the National Audit Office (NAO), and other specialised institutions charged with evaluating how the government apportions and uses public finance. Ministries also have their internal auditing structures.

Each item within the national spending budget, as published in the annual *Financial Estimates*, is monitored. Granularity in the presentation of the individual budget items is at times minute. Approval for spending, even from already allocated and Parliament-approved budget items, requires the express authorisation of the MF to ensure that the correct procedures are followed. Additionally, a special permanent Parliamentary Committee (the Parliamentary Accounts Committee – PAC), is responsible for examining public spending – by summoning people responsible for government spending, on any issue/budget item, to appear before it – and of reporting its findings directly to Parliament.

In this context, obligations in relation to the Classification of the Functions of Government (COFOG) and European System of integrated Social Protection Statistics (ESSPROS) are not considered only as obligations, but as important administrative and monitoring tools. All the data on incurred and proposed expenditure by individual budget item are available, with clear distinctions between capital and current expenditure (technically known as 'recurrent expenditure'). In view of Malta's size, there are no separate regional provisions for government social spending.

The strength of the current system is its flexibility, in the sense that the Auditor General is free to undertake literally any action to monitor social spending, and is then free to publish the findings unfettered. Equally the departments in the ministry responsible for social spending can direct its internal auditing structures to examine any aspect of social spending that they deem fit, and this can be done quickly and without much bureaucratic time-lag for it to be first approved and then undertaken.

Conversely, the weaknesses of the system are extensive, in so far as there is no mandatory and regular assessment of the effectiveness of the financial outlays involved, particularly of the effectiveness of policies specifically aimed at reducing poverty and engendering equality. The other main weakness derives from the fact that no *direct* links to empirical studies are taken into consideration when policies are introduced or amended: policy-makers do of course base themselves on trends and studies in general, but they are not tied down to any specific research or other instrument.

# 1 Country-specific monitoring frameworks for public social spending

## 1.1 Country-specific dedicated monitoring framework(s)

Malta uses, but does not depend exclusively on, its COFOG and ESSPROS obligations to monitor social spending. Monitoring of public expenditure of any kind, and therefore including social spending, is primarily exercised by the MF through the annual publication of the *Financial Estimates*. This publication provides details of actual expenditure in the preceding year together with the proposed expenditure allocations for the following year.

Expenditure on budget items (or 'votes'<sup>1</sup>) is subject to approval by the MF. In addition, the NAO has a duty to audit every area of expenditure, at all levels. At the Parliamentary level, a special committee, the PAC, is charged in law with investigating, and reporting directly to Parliament on, any area of government expenditure it deems fit. The PAC also has the power to summon any public servant, including ministers, to account for the expenditure in their respective ministry.

The responsibilities of the various bodies involved are described in further detail below.

The **MF** (sometimes referred to as the Treasury), is the central government ministry primarily responsible for monitoring public expenditure, including social spending. It is also responsible for the management of the economy and taxation policy. In the annual budget prepared by the MF, the minister officially presents the *Financial Estimates* for the following year, together with a detailed review of the preceding year, for approval by Parliament. The *Financial Estimates* are accompanied by an *Economic Survey* that analyses economic trends, including their impacts on the overall social aspects of the economy. As already noted, spending departments require authorisation from the MF to incur expenditure, even from budget items approved by Parliament.

The **NAO** is the independent public spending watchdog for Malta, which reports directly to Parliament and not to a ministry. Its functions include: improving support for effective accountability and scrutiny; increasing its impact on outcomes and value for money (i.e. monitoring effectiveness); and providing more accessible independent insight. The Auditor General leads the NAO and is tasked with the responsibility of certifying the accounts of all government departments and many other public sector bodies. The NAO has statutory authority to examine and report to Parliament on whether departments and the bodies they fund have used their resources efficiently and effectively. The NAO can decide which value-for-money examinations to carry out; and it can use rights of access to documents and staff to get information and explanations. These generic functions are at times focused on specific aspects of government spending, at the discretion of the Auditor General.

The **PAC** is a permanent Parliamentary Committee of MPs, chaired by a member of Parliament from the Opposition. The task of the PAC is to hold the executive to account. Members of government and any other officials, as well as any state-financed bodies such as public corporations, have to respond to the requests of the PAC. All PAC meetings are televised directly on the dedicated Parliament TV channel, and the recordings and any documents involved are immediately available online for anybody to access.

**Individual ministries and departments** regularly publish their audited accounts<sup>2</sup> and estimates. They also publish annual reports, in which they review their work and their

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<sup>1</sup> The term 'vote' in technical accountancy terms refers to an item of the budget. Expenditure is provided for under 'votes', with one or more votes covering the functions of each department or office. See <https://www.audit.gov.ie/en/find-report/publications/2012/chapter12-vote-accounting.pdf> p.172.

<sup>2</sup> See e.g. in respect of the Ministry of Health: *Audited Accounts and Estimates* at <https://deputyprimeminister.gov.mt/en/epa/Pages/publications/audited-accounts-and-estimates.aspx>.

spending during the year covered by the report, and also summarise their plans for the forthcoming years. These reports are published in Maltese, the national language<sup>3</sup>. The latest report by the Ministry for Social Justice and Solidarity, the Family and Children's Rights covers 2020. The annual report by the Ministry of Health covers specific aspects of the ministry's work (e.g. the 2020 report covered trends in fertility treatments<sup>4</sup>). In certain specific areas, different bodies publish more detailed reports about their specialised remit. Thus, for example, the Commissioner for Mental Health publishes an annual report: the latest such report was published in 2020 and covered 2019<sup>5</sup>.

## 1.2 Separate monitoring framework(s) linked to schemes provided by employers

Social insurance schemes organised by employers are practically non-existent in Malta. Accordingly, Malta does not have a monitoring framework that covers employment-related social insurance schemes organised by employers.

## 1.3 Distinction between current expenditure and capital expenditure

Current (recurrent) and capital expenditure are budgeted for separately and audited separately as well<sup>6</sup>. Capital expenditure covers all expenses that involve a one-off outlay, such purchases of buildings and machinery. Current expenditure covers all outlays that are necessarily repeated from year to year to maintain the system, such as wages and salaries, and consumables.

## 1.4 Type of monitoring: level and outcomes

The systemic framework under the responsibility of the Ministry of Finance, as part of the exercise of expenditure control as described above, primarily monitors the level of spending. Social outcomes are not systematically monitored. However, these are at times audited on an ad hoc basis both by the NAO and by the PAC. An example of the performance audits conducted by the NAO is the 2014 report on social benefit fraud<sup>7</sup>, the purpose of which was to ascertain whether social spending was being misused or misdirected. The NAO has recently published an assessment of the implementation of the sustainable development goal of alleviating poverty<sup>8</sup>. As clearly stated in the conclusion of that report, the study was meant to evaluate whether government social spending had contributed to the alleviation of poverty:

*"These efforts have sought to broadly address the needs of vulnerable groups, as well as improve on the sufficiency, timeliness, accessibility and effectiveness of services and benefits delivered."*<sup>9</sup>

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<sup>3</sup> See Malta Government (2020). Links for the reports from 2016 are available at <https://family.gov.mt/en/policies-publications-and-strategies/annual-reports/>.

<sup>4</sup> Available at [https://deputyprimeminister.gov.mt/en/epa/Documents/publications/annual-reports/Annual\\_Report\\_2020.pdf](https://deputyprimeminister.gov.mt/en/epa/Documents/publications/annual-reports/Annual_Report_2020.pdf).

<sup>5</sup> Office of the Commissioner for Mental Health (2020).

<sup>6</sup> All expenditure in one specific year is 'current'. The correct technical term to distinguish capital expenditure from other expenditure in one specific budget year is 'recurrent'. This is 'clear from 'Government Spending Watch' <https://www.governmentspendingwatch.org/component/content/article/8-govt-spending-site/7-definitions-and-sources>. In this document the term 'current' should be understood in its technical sense as 'recurrent'.

<sup>7</sup> National Audit Office (2014).

<sup>8</sup> National Audit Office (December 2020).

<sup>9</sup> Ibid. p. 22.



## 1.5 Level of granularity of public social spending

As already explained, the level of granularity is quite extensive in the *Financial Estimates* and in the ministries' annual reports. Data therein are presented in nominal terms. In a separate document presented with the annual budget, the *Economic Survey* discusses trends, as is also done in regular reviews by the Central Bank and in the annual report of the National Audit Office. On an annual basis, the National Statistics Office also issues a publication that summarises breakdowns of spending, including by locality<sup>10</sup>. In addition to regular newsletters, the National Statistics Office has recently published a detailed summary of social spending by sector and scheme, covering the period<sup>11</sup> 2014-2018, in a publication that runs into 270 pages. In this publication the data are provided in nominal terms, by ESSPROS function, by individual programme, and as a percentage of GDP.

## 1.6 Breakdown of public social spending

There are no breakdowns by specific population groups except when budget items are meant as expenditure for specific sub-groups – for instance, vote 5196 within the Ministry of Health, which covers ex gratia compensation to haemophiliacs<sup>12</sup>.

## 1.7 Timing and public accessibility of data

The annual *Financial Estimates*, with data on actual expenditure in the previous year, are published on the same day that the national budget for the following year is presented to Parliament, normally in October. They are immediately available online for free downloading. Reports by other entities, such as those produced by the NAO and the annual reports of ministries, are also normally freely available online. PAC discussions are televised live on the Parliament TV channel, and a recording is then immediately streamed online with open access; documents resulting therefrom are also available instantly online.

Data on social benefit expenditure at an aggregate level are published on a monthly basis by the National Statistics Office as part of its *Government Finance* monthly data release<sup>13</sup>. Detailed data on social benefits are published on a quarterly basis by the National Statistics Office<sup>14</sup>.

## 1.8 Sub-national frameworks

Given Malta's size, all public social spending is organised on a national basis. Local councils at times take peripheral initiatives, but there are no specific reports on social spending by these councils.

# 2 Reporting/review tools for public social spending

## 2.1 Introduction

Malta does not have an official monitoring and auditing instrument that regularly audits social spending. Nor have any extensive ad hoc tools been devised so far. Some past and current initiatives have vaguely implied that some kind of social spending evaluation was

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<sup>10</sup> For the summary for the period 2014-2018, see National Statistics Office (2020).

<sup>11</sup> Ibid.

<sup>12</sup> See Ministry of Health (2022) p 77.

<sup>13</sup> [https://nso.gov.mt/en/News\\_Releases/View\\_by\\_Unit/Unit\\_A2/Public\\_Finance/Pages/Government-Finance-Data.aspx](https://nso.gov.mt/en/News_Releases/View_by_Unit/Unit_A2/Public_Finance/Pages/Government-Finance-Data.aspx)

<sup>14</sup> [https://nso.gov.mt/en/News\\_Releases/View\\_by\\_Unit/Unit\\_A2/Public\\_Finance/Pages/Government-Expenditure-on-Social-Security-Benefits.aspx](https://nso.gov.mt/en/News_Releases/View_by_Unit/Unit_A2/Public_Finance/Pages/Government-Expenditure-on-Social-Security-Benefits.aspx)

/ is / will be undertaken; others were intended to evaluate social spending qualitatively; and others contained requests for support to develop and implement such tools. The set of initiatives undertaken so far will be described briefly below, and an indication of their implications for an evaluation of social spending will be highlighted in the last paragraph for each section.

## 2.2 Anti-poverty strategy

In 2014-2015 Malta undertook studies that led to the development of an anti-poverty strategy<sup>15</sup>. This was followed by two evaluation reports covering the period 2014-2019. The first covered the 2014-2016 period<sup>16</sup>, whilst the second one, conducted in 2020, covered 2017-2019<sup>17</sup>.

Both studies focused on the implementation and evaluation of the policy and were quite detailed. Neither of them was an exercise to evaluate social spending as such, except in a generic way. The evaluations focused more on the effectiveness of the policy, irrespective of the cost to the state. Detailed suggestions for improvements in the benefits in a number of sectors were, however, included.

The fact that improvements in benefits were introduced following these reports suggests that some kind of prior evaluation, albeit unspecified, of the effectiveness of the spending involved must have been carried out.

## 2.3 2020 pension reform evaluation

A Strategic Review of the 'Adequacy, Sustainability, and Solidarity of the Pension System as Mandated by Article 64B of the Social Security Act 2020' was launched in 2020. A public consultation was undertaken by the Pension Study Group in December 2020. The supporting document for this consultation summarised the reform steps taken up to that point and the five principles on which the reforms had been based<sup>18</sup>. This important consultation document requested feedback from relevant bodies, civil society, and the general public – seeking suggestions and recommendations in the light of the social and economic analysis provided in the report itself, and obviously in the context of Malta's social and economic life as a whole. The as yet unpublished report will be discussed within the Parliamentary Social Affairs Committee, as required by the above-mentioned Article of the Social Security Act.

The effectiveness/adequacy of social spending on pensions is very likely to be one of the main issues to be discussed.

## 2.4 Occasional research papers

Occasional papers produced by research officials of the Central Bank contribute to an understanding of the effectiveness of social spending in Malta. The Central Bank is obviously not the institution that is specifically tasked with carrying out these studies. The following three studies deserve mention in this context:

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<sup>15</sup> Available at: <https://family.gov.mt/wp-content/uploads/2021/05/Poverty-Strategy-14-MT.pdf>.

<sup>16</sup> Available at: <https://family.gov.mt/wp-content/uploads/2021/05/Implementation-and-Evaluation-Report-2014-2016.pdf>.

<sup>17</sup> Available at: <https://family.gov.mt/wp-content/uploads/2021/05/NSP-Web.pdf>.

<sup>18</sup> The complete document is available at: <https://socialsecurity.gov.mt/wp-content/uploads/2021/02/Pensions-Strategic-Review-Report-2020.pdf>.

- a) 'The ageing of the Maltese workforce and the impact of pension age changes' by Aaron G. Grech (February 2020)<sup>19</sup>;
- b) 'The Inflation Experience of Low Income Households' by Jude Darmanin (2021)<sup>20</sup>; and
- c) 'The characteristics associated with the short and long-term unemployed in the Maltese labour market', by Ian Borg and Rafael Fearné (August 2021)<sup>21</sup>.

These occasional papers *indirectly* contribute to the auditing of social spending in Malta. But they do not constitute a tool that is recurrently used for that purpose.

## 2.5 Action as part of Malta's Recovery and Resilience Plan

Monitoring social impacts is an essential component of Malta's Recovery and Resilience Plan, which has only very recently been approved by the EU Commission. This is explained in the Annex to the Council Implementing Decision on the approval of the assessment of the Recovery and Resilience Plan for Malta<sup>22</sup>. Monitoring is directly or indirectly referred to in Section E.1.

In this document the need for monitoring is best expressed under Reform C5-R5, in which monitoring of the adequacy and coverage of unemployment benefits is specifically addressed in these terms:

*"The objective of this reform is to assess and periodically monitor the adequacy and coverage of unemployment benefits in Malta, to reinforce the resilience of the labour market as well as to enhance gender equality at large. This reform shall include a study assessing the adequacy and coverage of unemployment benefits and recommending policy options to achieve better adequacy and coverage of benefits, both in terms of duration and effective access, whilst enhancing the incentive to work. Taking into account the study's recommendations, a monitoring process shall be rolled out in order to periodically take stock of the effectiveness of policy measures that are in place. The first report shall be completed by the end of 2024, which shall set a date for the publication of the next report within five (5) years."*

Through the plan, the development of tools for the monitoring of social spending on *unemployment benefits* is on the agenda.

## 2.6 Participation in EUROMOD

The Economic Policy Department has partnered the "EUROMOD"<sup>23</sup> project since its early days. EUROMOD is a tax-benefit micro-simulation model for the European Union that enables researchers and policy analysts to calculate, in a comparable manner, the effects of taxes and benefits on household incomes and work incentives for the population of each Member State and for the EU as a whole. EUROMOD is used for internal technical assessments. Among other things, EUROMOD provides an estimate of: the redistributive effects of actual, previous or future tax-benefit policies; policy-swapping analysis; estimated budgetary effects of policy changes; tax-benefit design; estimated work incentive and labour supply effects of policies; and stress tests of tax-benefit systems. EUROMOD's specially designed tools and extensions are very useful – especially the

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<sup>19</sup> Available at: <https://www.centralbankmalta.org/file.aspx?f=92776>.

<sup>20</sup> Available at: <https://www.centralbankmalta.org/site/Publications/Economic%20Research/2021/policy-note-inflation-experience-low-income-households.pdf?revcount=4304>.

<sup>21</sup> Available at: <https://www.centralbankmalta.org/site/Reports-Articles/2021/policy-note-unemployment-duration.pdf?revcount=1496>.

<sup>22</sup> See: [https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CONSIL:ST\\_11941\\_2021\\_ADD\\_1&from=EN](https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CONSIL:ST_11941_2021_ADD_1&from=EN).

<sup>23</sup> See details on EUROMOD at <https://euromod-web.jrc.ec.europa.eu/>.

Hypothetical Household Tool (the plug-in for designing hypothetical households and generating data according to the chosen household characteristics, and for estimating the effects of taxes and benefits on household disposable income), and the Policy Effects Tool (through which one can estimate the first-order effects of policies on household incomes). The results from the use of these specialised models are not published.

Malta's EUROMOD Country Reports covering tax-benefit systems since 2007 constitute a very useful source for evaluating the effects of social spending, among other things<sup>24</sup>. It is to be noted that these reports only present factual data, not qualitative evaluations.

## **2.7 External support through the World Bank: rebalancing of the Social Safety Net programmes<sup>25</sup>**

The Government of Malta has recently requested the World Bank to provide technical advisory services to support efforts to rebalance the current structure of Social Safety Net programmes in favour of more progressive social protection programmes. The project, which is currently underway, focuses on three main components, of which Component 1 (Stocktaking and Policy Level Analysis) is the most relevant in the present context. This encompasses three main tasks: (a) an inventory and mapping of existing social protection interventions (including social assistance, tax benefits, and pensions), focusing on implications for the policy of safety nets; (b) the exploration and development of potential reform options to increase the progressivity of social assistance (safety nets), including the potential expansion of tax-benefits; and (c) recommendations, and a reform roadmap. Although the analysis will focus on safety nets (various forms of social assistance and tax-benefits, including both in-cash and in-kind benefits), it will also consider the specific interactions of contributory and non-contributory benefits.

The support from the World Bank to relaunch the Safety Net Programmes will automatically imply the development of instruments that will measure the effectiveness of social spending and identify how this effectiveness can be improved. The project is expected to be concluded during 2022.

## **2.8 The National Plan under the Council Recommendation on Access to social protection for workers and the self-employed**

This plan, which has been developed in line with the Council Recommendation of 8 November 2018 and the subsequent guidance for National Plans on access to social protection for workers and self-employed people<sup>26</sup>, constitutes an example of a review that examines social spending in Malta in one specific sector<sup>27</sup>.

The first two sections of the plan present (respectively): an overview of the current measures in place, including an overview of Malta's state of play in relation to the implementation of the Council Recommendation; and a summary of the measures related to COVID-19 taken by Malta. These sections are in turn followed by two very important sections covering: (a) the identification of challenges and existing gaps; and (b) measures to be introduced, or already launched since the adoption of the Council Recommendation.

In the plan, four studies, which clearly focus on specific sectors of social spending, are to be conducted between 2022 and 2024. The first will be a strategic review of the adequacy, sustainability, and solidarity of the pension system. Three others will examine access to

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<sup>24</sup> The latest EUROMOD Country Report for Malta covering tax-benefit systems for the period 2017-2020 is available at [https://euromod-web.jrc.ec.europa.eu/sites/default/files/2020-12/Y11\\_CR\\_MT\\_Final.pdf](https://euromod-web.jrc.ec.europa.eu/sites/default/files/2020-12/Y11_CR_MT_Final.pdf).

<sup>25</sup> Information on this programme has been provided by Director General of the Economic Policy Department of the Ministry of Finance, dated 3 November 2021.

<sup>26</sup> European Commission (2019).

<sup>27</sup> The complete document is available at <https://ec.europa.eu/social/BlobServlet?docId=24851&langId=cs>.

social protection for workers and self-employed people, focusing respectively on: unemployment benefit; invalidity, and benefits in relation to accidents at work and occupational diseases; and sickness, maternity and paternity benefits.

As clearly stated at the very beginning of the plan<sup>28</sup>, its thrust is very clearly evaluative. It will look at the challenges and constant pressures for improved provision, while also reflecting the constraints on what can be done to ensure that the social welfare system provides the Maltese people with more than the bare minimum to survive. The expectation is that this initiative will provide specific tools whereby current and future expanded benefits in the areas covered will meet the twin objectives of adequacy and sustainability.

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<sup>28</sup> Ibid. p. 2.

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