



**SOCIAL INEQUALITY AND WHY IT MATTERS FOR  
THE ECONOMIC AND DEMOCRATIC DEVELOPMENT  
OF EUROPE AND ITS CITIZENS: POST-COMMUNIST  
CENTRAL AND EASTERN EUROPE IN  
COMPARATIVE PERSPECTIVE**

**DELIVERABLE 2  
DESK RESEARCH**

**ROMANIA**

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## CONTENTS

<b>Introduction</b>	<b>p.2</b>
<b>Section 1. “Objective” indicators of social inequality</b>	<b>p.3</b>
1.1. Socio-economic indicators	
1.2. Human Development Characteristics	
<b>Section 2. Manifestations, causes and correlates of social inequality</b>	<b>p.14</b>
2.1. Inequalities in wealth and living standards	
2.2. a. Wealth and living standards	
2.2. b. Occupational Structure, Employment and Retirement	
2.2. c. Poverty	
2.2.d. Inequality in educational attainment and access to education	
2.3. Inequality in health and access to the healthcare system	
<b>Section 3. Social inequality and national political culture</b>	<b>p.35</b>
<b>Section 4. Social inequality and the national party system</b>	<b>p.40</b>
4.1. Political parties and inequality: an over time perspective	
4.2. Explanations for the stances and salience of social inequality in the national party systems	
<b>Section 5. Mechanisms for amelioration of social inequality</b>	<b>p.49</b>
5.1. a. Government policies	
5.1.b. Trends in tax revenue and welfare spending since the collapse of Communist power	
5.2. Alternative non-governmental mechanisms for amelioration of social inequality	
<b>Selected bibliography</b>	<b>p.61</b>
<b>Appendix</b>	<b>p.74</b>

## **Introduction.**

Romania is one of the poorest countries in Europe and one of the lowest ranking in terms of its Human Development Index. Neither post-communism nor EU accession changed that placement. The aim of this paper is to provide an overview of the main dimensions of social inequalities in Romania and of the existing knowledge on their manifestations and the politics and the policies meant to tackle them.

The paper will start with an overview of trends in income, wealth and health at the country level (Section I). In this manner, by providing an overall picture of the economic and social situation in Romania it is possible on the one hand to place the distinct manifestations of inequalities in the more general context of the socio-economic structure of the country (which is what this study does). On the other hand, just like the entire background paper, it allows to situate Romania in a comparative context, at least within the countries covered in the Eurequal project (as a result of the juxtaposition of all country papers in the project and the comparative paper).

The presentation of the different manifestations or dimensions of inequalities is the logical next step. This paper tries to review what previous analyses suggest about the causes and correlates of inequalities (Section II). The subjective part of inequalities will be reviewed in Section III. The political parties' positions on inequalities will be presented in Section IV and the policies aimed to ameliorate inequalities in Section V.

Post-communism led to an increase in social inequalities, not only in terms of distribution of income but of occurrence of the extremes, therefore poverty is considered to be a very important problem. Education is another aspect where inequalities increased and changed shape compared to the immediate post-transition status quo in 1990, with more people from each cohort going to university but fewer graduating high school, creating an even bigger gap between educated and uneducated, with rural areas particularly affected. In a culturally rather traditional society with an underdeveloped economy, there are predictably great disparities between rural and urban areas as well as between occupational sectors. In terms of ethnicity the significant discrepancies are not so much between Romanians and Hungarians (although important inequalities in access to education and the labour market are present in that dimension too), but between the majority of the population and the ethnic Roma, a marginalized and poor, with low levels of enrolment in

education, participation in the labour force and thus in the social security system. Romania's peculiar form of communism has a lot to do with the current situation, but it also had an impact on the level of studies in the social sciences including on the topics of interest in this paper.

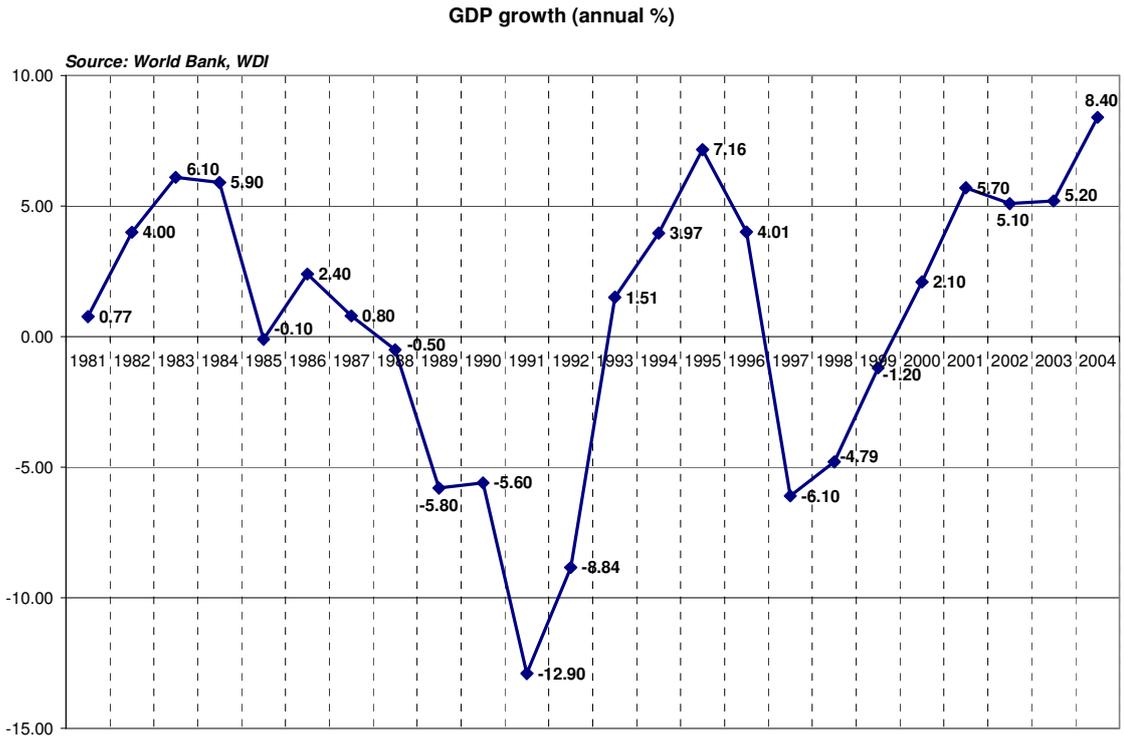
## **Section 1. "Objective" indicators of social inequality**

This section looks at the forms inequalities take and prepares the ground for understanding the sources and correlates of inequality, presented in a more detailed manner in section II.

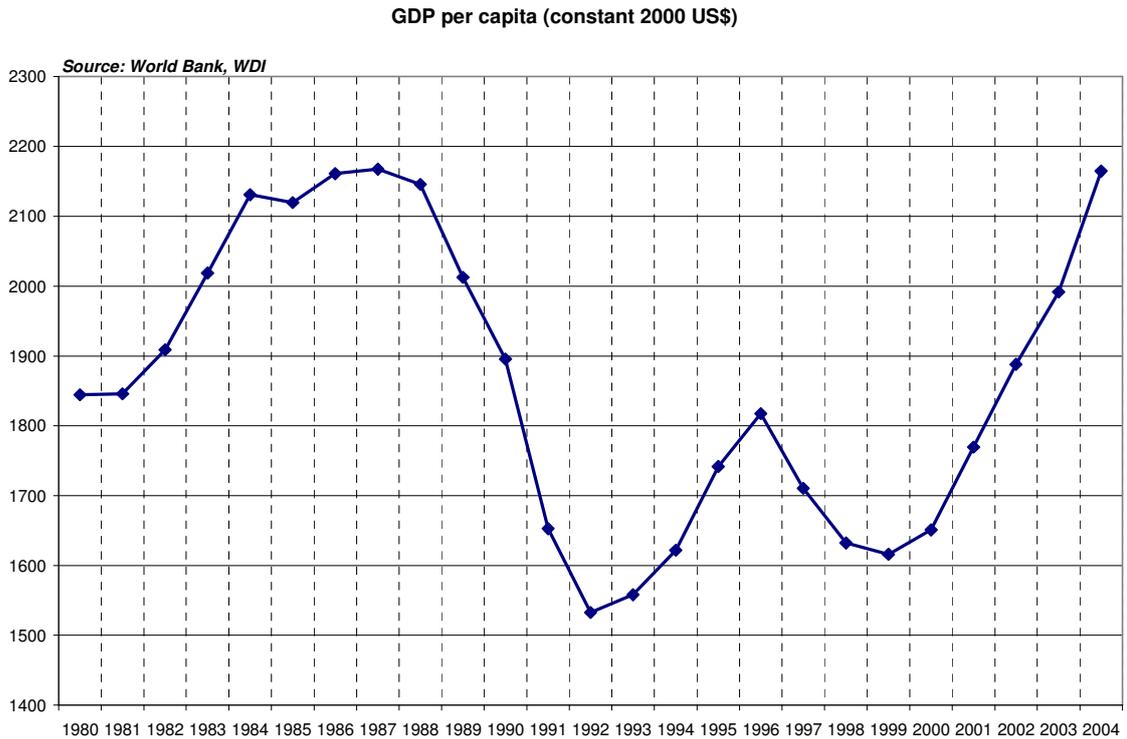
### **1.1. Socio-economic indicators**

Unlike in many other post-communist countries, trends in GDP growth in post-communist Romania did not follow a generally upwards trend after a single initial recession, but periods of increase were followed by large drops and stagnation. There was an increase in the rate of GDP growth from 1991 to 1995 and again after 1998 until present. It was starting to increase from a low of -12.9 in 1992, and negative GDP growth was experienced until 1994 and in 1998 and 1999 (see Table 1.1a in *Annex2* and Graph 1.1.a below). GDP per capita followed a similar zigzag-like path suggesting the problems of the Romanian economy and the rather unwieldy route it took after 1989, whilst their low levels place Romania among the poorest countries in Europe (see comparative assessment in UNDP 2005).

#### **Graph 1.1.a: GDP growth**



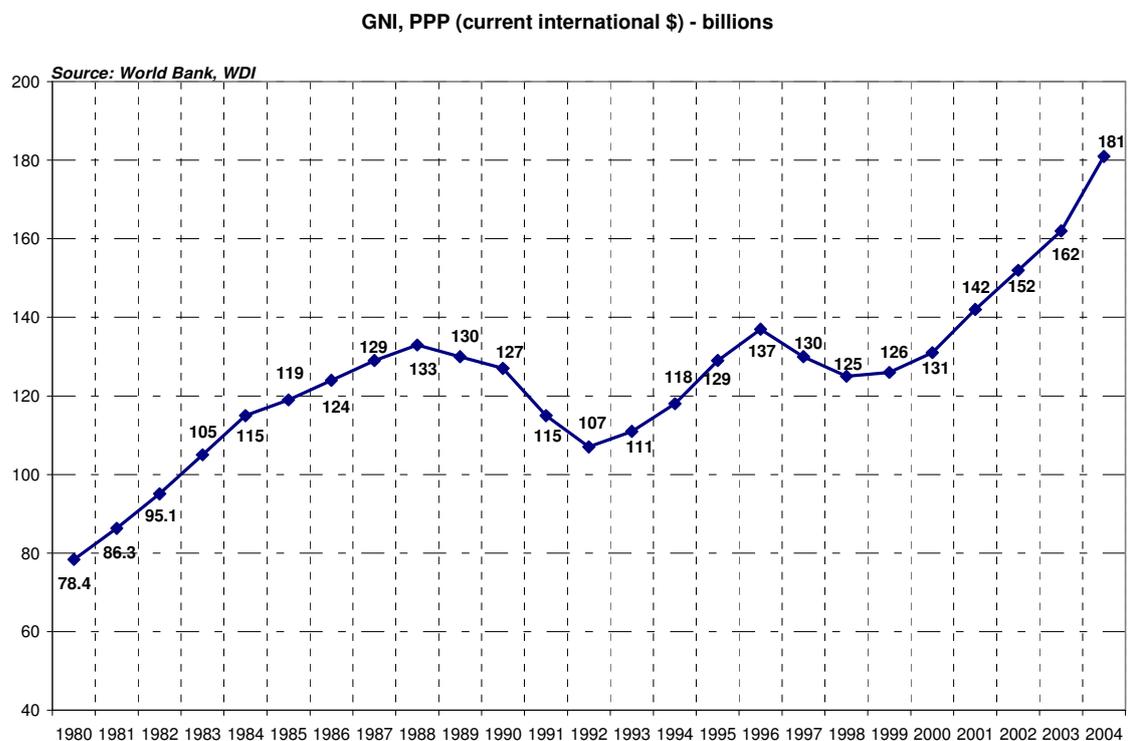
**Graph 1.1.b: GDP per capita**



Moreover, given the extremely low living standards of Romanians in 1989, with significant shortages in basic food items as well as in the provision of water, heating and electricity, it was to be expected that an increase on all indicators related to consumption and living standards to occur although probably a (smaller or larger)

part of the population being excluded from this trend. This is indeed the case as trends in purchasing power parity gross national income and household final consumption expenditure suggest, even if occasional downward movements do occur in this respect too.<sup>2</sup> (see table 1.2a&b in *Annex* and Graphs 1.2.a&b below).

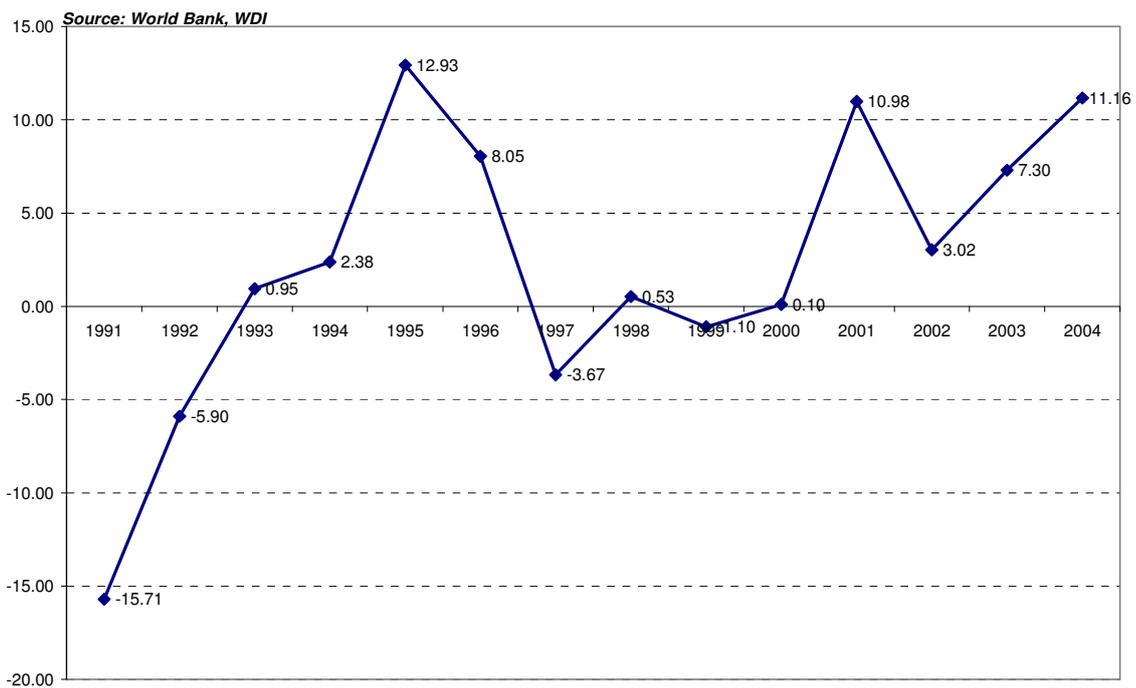
**Graph 1.2.a**



**Graph 1.2.b**

<sup>2</sup> See definitions in the Annex.

### Household final consumption expenditure (annual % growth)



What is somehow surprising is that official statistics, as reproduced also by the World Bank and the UNDP reports, suggest an upwards trend in GDP per capita before 1989, even in the 80s, and an abrupt drop after 1990 with some ups and downs during the post-communist period (See Table 1.1 a and b and Graph 1.1b). According to these figures post-communist GDP per capita attained the 1989 level only in 2004 and the lowest of communist times GDP per capita encountered in the 1980s was matched only in 2002. It seems to us that it is crucial to note that although these trends in gross domestic product clearly suggest a difficult economic path, two caveats are however necessary.

First, more than a pinch of salt is necessary when looking at Romanian communist-era statistics. Any calculation of purchasing power using official prices is gravely marred by the fact that almost none of the items included in the basic needs basket were available at the official prices for the ordinary citizen. Shortages and cuts were very frequent even in basic services like electricity, water and heating. Other, 'less' basic consumer goods from fresh meat to toilette paper were often only available through connections. Therefore, not only were living standards lower than the actual salaries would suggest, but real prices were also much - anywhere between 3 and 15 times - higher than the official ones. Consequently, the bases of social stratification were also impacted by the fact social and symbolic capital was as necessary as - or even more important than - money in the acquisition of everyday goods and services (Campeanu 1994, Voicu B. 2005, Voicu M. 2005).

Second, it is important to note that trends in GDP per capita do not automatically translate into parallel trends in actual living standards, household consumption or poverty and well-being. This is especially the case with respect to some authoritarian regimes. It is generally acknowledged that during the Ceausescu regime a lot was spent on paying off the foreign debt and developing megalomaniac projects (such as the 'House of the People' government complex, which is the second biggest building in the world after the Pentagon, and its whole neighbourhood of communist-era luxury built after the expensive demolition of a historical neighbourhood). Given the problems of measurement, we consider that a direct comparison between pre and post communist times is not the most reliable and pertinent strategy despite its frequent use in the Romanian sociological literature as

well as in some governmental reports.<sup>3</sup> Yet, we will refer to trends over time after 1990. But we will emphasize at different points in the paper the need to produce better measurements of wealth, and thus of inequalities in countries undergoing major transformation like those in post-communism.

The problem of comparison with 1989 and before is less relevant when looking at the GINI index since the relevant trend is anyway during post-communism. However, problems of data accuracy remain. Table 1.3 shows that different sources provide different data and thus highlight some more general problems with statistical data in and about Romania. However, the figures all suggest similar trends: an increase of the GINI coefficient during the post-transformation recession between 1989 and 1995, suggesting a peak of high disparities around 1995 or 1998, then followed by a largely downward trend from 1996 to 2003 in the ICCV data and a stagnation (since 1998) in the much more sparse WDI time series. A cross-national comparison would tend to suggest that Romania has more income inequalities than Finland or Hungary but still less than Russia and the United States; the Romanian GINI figure is in the same range as that of France, Spain and the Baltic countries.

**Table 1.3. GINI Index across time and sources**

YEAR	GINI (PiR)	GINI (ICCV)	GINI (WDI)
1989	21		23.31
1993	23		
1994	30		28.2
1995	31	31.6	
1996	30	30.8	
1997	28	29.6	
1998	30	29.3	31.19
1999		28.6	
2000		28.6	30.25
2001		28	
2002		28.8	
2003		28.1	31.046

**Legend:**

PiR – Poverty in Romania 2001, a UNDP & ICCV Study, by Zamfir, Marginean et.al.  
 ICCV – Research Institute of the Quality of Life, Bucharest  
 WDI – World Bank Database of World Development Indicators;

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<sup>3</sup> We will discuss the reasons for which the sociological literature and a number of authors take such a viewpoint in the last section of this paper.

One problem generally noted about the GINI index is that it does not take into account capital gains, income from rent, and gifts (i.e. bribes, or transfers from relatives working abroad). It puts the emphasis on declared income and excludes the informal economy, and thus it is not an accurate estimate of actual wealth and wealth inequalities especially in countries with a high informal sector. This is likely to be the case in Romania, given the size of the informal economy (Stanculescu and Ilie 2001, Voicu B. 2005), the non declared incomes from private tutorship and ‘gifts’ or bribes (Voicu M. 2004) as well as the recent increase in income from real estate and stock market dealings (taxable only since 2007). This problem is likely to affect incomes at all levels, and it is not possible to fully assess these aspects; yet one cannot safely assume that they cancel each other out in the generation of income inequalities. Therefore one should also look at (a) poverty rates, (b) sources of income, (c) the standard deviation of incomes (or wealth), the actual income of the highest percentile and the lowest percentile compared to the average wage, and (d) how income inequalities are correlated and interact with other forms of inequality. The last three will be analysed in section II of the paper.

According to Bogdan Voicu, after 1990 the poverty rate increased rapidly, experienced some oscillations at high levels, and started a descending trend from 2000. As figure 1.3 shows, according to the calculation methodology of CASPIS (Governmental Commission for the Alleviation of Poverty, see Annex for methodology), in 2000, at the national level, the poverty rate was 30.6%, and the severe poverty rate 12.2% (CASPIS, 2002).

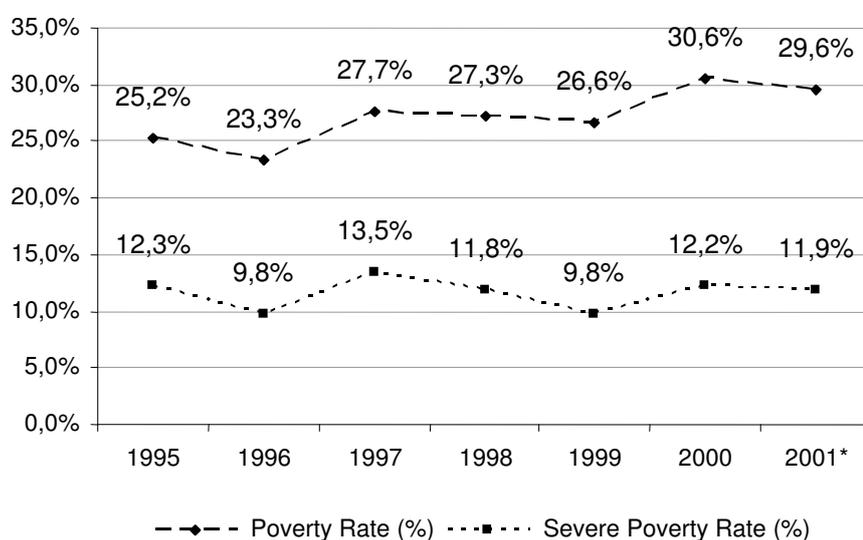
Throughout the 1990s, except in 1997, the poverty rate has been constantly over a quarter of the country’s population. Wage earners’ households included the highest number of poor. The poverty rate among those employed was, in 1998, 6.8% (at 2\$ PPC per day) and 44.5% (at 4\$ PPC per day) (Transition Report 2000, p.107)<sup>4</sup>. This represented, at that time, the highest poverty rate among those employed after Albania and Moldova in Central and Eastern Europe. The percentage of these persons in the total number of poor people was 42.18%, in 1997, this percentage corresponding to the relative threshold of 60% from the average consumption costs for an adult equivalent, according to the equivalence scale used by the National Statistical Office (Minoiu 1999: 83). The report of the minimum salary compared to

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<sup>4</sup> Transition Report 2000, European Bank for Reconstruction and Development. p.107, 2000

the average one deteriorated from 56.5% in 1989 to 24.2% in 2000, through a decrease in the minimum salary (Zamfir, Marginean et al 2001).

**Figure 1.3. Trends in poverty rates over time 1995- 2001(according to CASPIS methodology)**



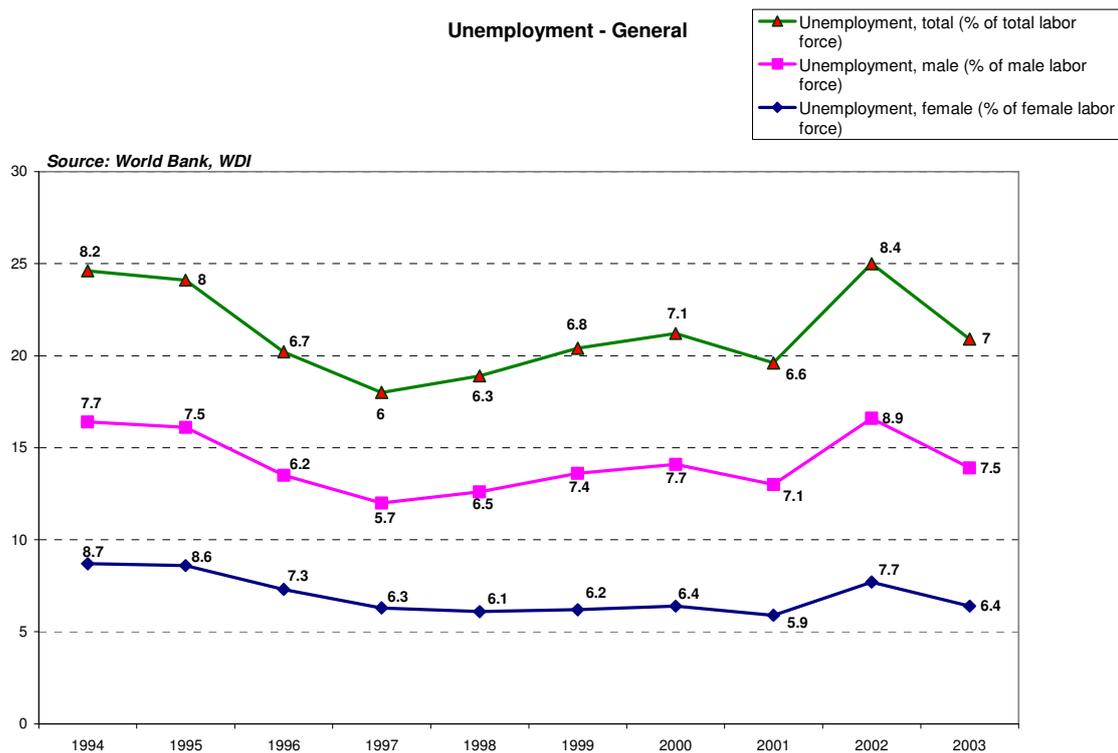
Moreover, in terms of wages, there is a big discrepancy between the minimum net wage (150 Euro at PPS equivalent) and the average net salary (353 Euro at PPS equivalent) with 12.2% of the employed having the minimum wage (MCDIS - Memorandum on Social Inclusion: 2005 using data for 2003 from the National Statistical Office). The Memorandum itself, although part of a governmental analysis and strategy, suggests that because of the high levels of employers' contributions, a large number of people have the minimum salary in their work contracts and receive the rest in other (untaxed) benefits (MCDIS 2005: 2).

Unemployment is another important objective indicator of inequality given the clear disadvantaged status of those out of employment, especially those who are in such a situation long-term. Unemployment was a new phenomenon after 1989 especially because during communism unemployment was neither recognized, nor accepted (Voicu M. 2005, Voicu B. 2005). The occupation rates of people aged 15-64 was 57.6 in 2003, lower than the 1997 rate of 65.4, which remain below the EU-15 average but above the ten new member states (Eurostat figures and estimates cited in MCDIS 2005:4).

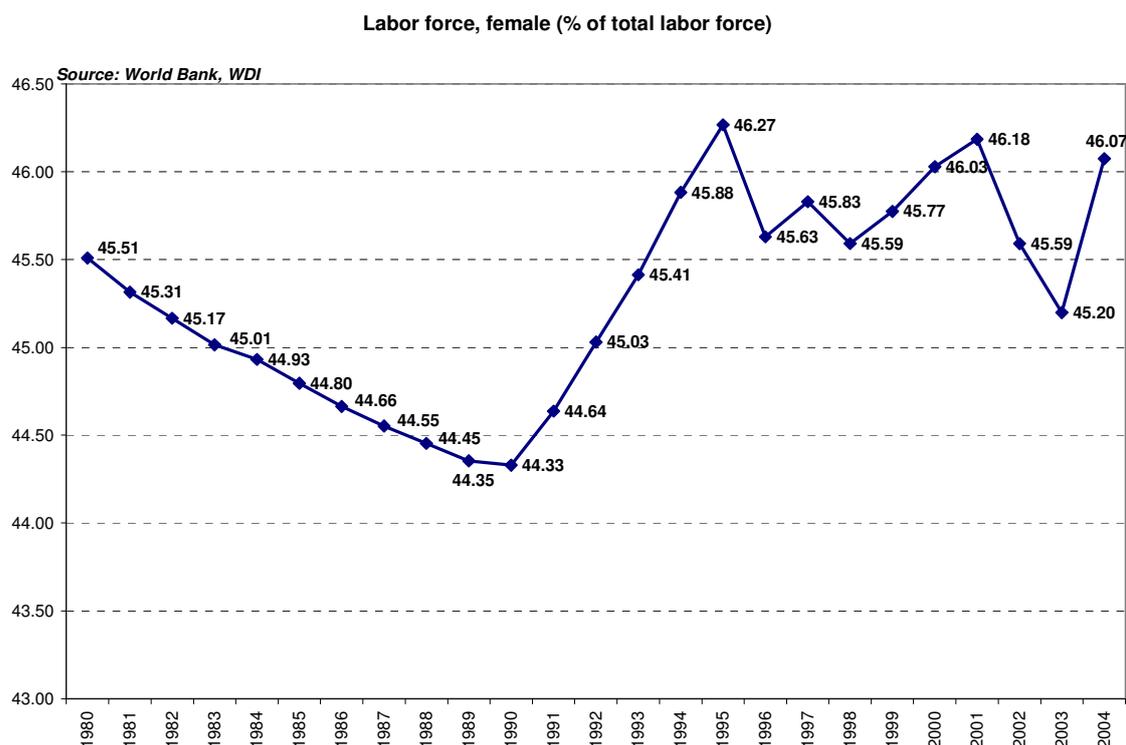
Massive employment loss was due to the collapse of some industry branches, primarily those developed by the communist regime for ideological reasons such as mining and heavy industry, and unable to compete in a market economy. This is also

reflected in the drop in the relative presence of men in the total labour force (see Graph 1.4.b). In some industrial areas, developed around a sole economic unit, where population had been drawn mostly by forced urbanization policies of the communist regime, entire local economies disappeared after '89, no alternatives being offered to the locals. Parallel with economic recovery, unemployment decreased.

**Graph 1.4.a. – Unemployment rate (total, male, female)**



**Graph 1.4.b. – Percentage of female labour force in total labour force**



## 1.2. Human Development Characteristics

### Education

As of 1999, Romania still had a roughly 3% illiterate population (UNDP Human Development 2000). This, however, was itself the result of significant improvements in the completion rate in primary education that reached saturation at the end of the post-transition decade (see Table 1.5b). A general overview of the 1996-2003 period is available in table 1.5.a. (*Annex 2*)

**Table 1.5b. Gross enrolment rates by type of education**

Source: *The National Report of Human Development, Romania, 2000, PNUD*

<i>Education forms</i>	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
<i>Primary</i>	90,8	92,4	93,8	96,9	99,7	99,5	99,1	97,5	99,8	100,0
<i>Gymnasium</i>	91,4	88,9	86,1	86,5	84,3	86,7	86,4	94,3	94,3	93,9
<i>Secondary</i>	90,7	76,1	65,7	63,7	66,1	68,6	69,1	68,6	67,8	69,4
<i>Superior</i>	10,6	12,5	20,2	22,7	20,9	22,2	22,7	22,7	25,4	28,0

The following changes can be noted in terms of educational enrolment after 1990:

- attainment, at least officially, of full enrolment in primary school (ending around ten years of age). Some problems of attendance and dropout remain present, but a great leap forward was achieved compared to 1990, when almost one in ten children did not even finish four years of education. Clearly, this was a source of an underclass that had extremely limited chances of gainful employment in a market economy.
- some fluctuations in enrolment in gymnasium (4 years, normally between 10 and 14 years of age), with marginally higher rates at the end of the period than at the beginning;
- a highly significant drop in enrolment in secondary education. While in 1990 virtually everyone completing gymnasium continued towards a secondary degree, by 1999 nearly one-quarter of the respective generation finished gymnasium but did not continue to secondary school.
- the higher education sector greatly expanded after 1990, with the total number of students having doubled.

Other data from the same source (not shown in our table above) suggests that the internal structure of secondary education also changed greatly. Enrolment in secondary technical schools accounted for 85% of the total secondary school student population (or in other words over 70 percent of the respective generation) in 1990, but only for 62.3% (barely more than 40 percent of the respective generation) in 1999. This drop then accounts for basically the entire drop in secondary school enrolment.

As regards nursery schools, in comparison to 1989 the pre-school sign-up rate first dropped from an initially very high 83% to 50.2% in 1993, and then slightly increased (Jigau, Surdu 2002). Still, the sign-up rate for kindergartens was only 65.2% in 1999. This situation is usually seen as the consequence of the fact that after 1989 families played a greater role in primary care due to a drop in employment opportunities (UNDP 2000). However, it is also related to the unavailability of state kindergartens, especially at decent levels of care and hygiene (the latter applied before 1989) and the high costs of private kindergartens; it is also possible that the initially high rate reflected more the efforts of communist governments to control childhood socialization than genuine social demand.

### **Health characteristics**

Similarly with education characteristics, health characteristics provide another entry into understanding the outlook and level of development of the country. Here the tabular presentation aims to provide the background and a way to put in context the inequalities in access to healthcare presented in section II.X.

According to the Joint Memorandum on Social Inclusion, elaborated by the Government of Romania in 2005, during the transition period, the health characteristics of the general population went on a downward slope. The main factors influencing this trend were a massive and steady rise in poverty levels (influenced mainly by limited access to minimal health services, poor living and housing conditions, reduced access to public utilities), difficulties in reforming the health system, and high levels of alcohol, tobacco, and recently also of drug consumption.

As a result, Romania still has a very high mortality rate, with one of the highest *maternal* mortality rates, although the numbers significantly decreased since 1990. Also, the general life expectancy is at low levels, the *healthy* life expectancy levels being with 13 years lower than the general one.

The health characteristics of the Roma minority are –overall- much worse than the general population average. For example, the infant mortality rate in Roma communities is 4 times higher than the national average. Table 1.6 in *Annex 2* offers a general perspective for the 1990-2003 period.

## **SECTION 2. MANIFESTATIONS, CAUSES AND CORRELATES OF SOCIAL INEQUALITY**

In a background paper such as this one, it is not possible to unravel the multiple links, correlations and interactions that exist between forms of inequality and precisely establish chains of causation. There is clearly a causal link for instance between income disparities and educational inequalities, but the causality is often reciprocal and reinforcing: those with more education are more likely to have higher incomes, but also those who come from families on higher incomes tend to stay in education longer and to go to better schools. Moreover, those on higher incomes have better access to healthcare partly because they can afford the from-the-pocket expenses (private healthcare and paying ‘gifts’ for the medical personnel are very common in Romania). In case of shortages, they are the ones who will find solutions, not only due to income, but symbolic and social capital too. By being able to sort out

their health related problems, their earning capacity is less likely to be impaired by health problems. Also, existing disparities, for instance between regions or urban and rural have long-term, historical causes, which cannot be properly researched and thus included in this background paper, especially in the absence of credible previous research on the topic.

The circle of reinforcing inequalities - vicious for some, virtuous for others - is too complex to be fully disentangled here. The Romanian social science literature tries to a very limited extent to explore social inequalities in this multivariate manner and to develop along these lines of enquiry (sections of Voicu 2005 and Voicu 2004, are among the exceptions). Social history is also very underdeveloped and thus the bulk of knowledge on origins of disparities is quite limited.

Existing literature on sources of growth in inequalities often mixes causes and manifestations and does not develop on multivariate causal paths. For instance, in their study for the UNDP, Zamfir, Marginean and their colleagues suggest as ‘sources of growth in inequality’ (without, however, giving any systematic analysis buttressing inclusions and exclusions from the list or establishing the order of importance among the mentioned factors):

- Incomplete market economy
- Rising wage inequality
- Expansion of the informal economy
- Disproportionate taxation of the lower-income groups
- Corruption, bureaucracy and inefficiency in public administration
- Criminality and fraud
- The policy of correcting past injustices produced by the socialist regime

Different views do exist about correlates of inequality and the more complex mechanisms at work in the creation and reproduction inequalities. There is also a growing literature on specific aspects of inequalities, especially related to the Roma and gender, which we will try to refer to.

Therefore, we are in the not so fortunate position to have to synthesize disparate research and primary data on specific aspects, and to try to note the dimensions of a complex multivariate model of inequalities. In order to be able to

address the problem of concomitant manifestations and correlates, the section is split into three parts looking at manifestations of inequalities in terms of

1. wealth and living standards
2. education system
3. the healthcare system

Each manifestation is in turn analysed in relation to the relevant determinants of inequalities: income, occupation, education, residence, gender, age, household size and minority status, each to the extent that they are relevant.

In terms of residence, urban-rural and regional differences are both important in Romania, with rural urban discrepancies cross-cutting inequalities in almost all spheres of life. In terms of minority status, the principal aspect of concern is ethnicity, with reference especially to the Roma and Hungarians; disability is another important determinant of individual position, although its place in both research and public discourse is limited. Due to limits of space, only some of the more subtle forms of inequality are mentioned, especially when they represented an issue for political parties, which will be noted in section IV.

### **2.1. Inequalities in wealth and living standards**

A saying in Romania in the 1990s was that if before 1989 there was nothing in the shops to buy, after 1990 there is everything in the shops but people have no money to buy anything. This reflects the nature of the transition in Romania, namely the change from the shortages in availability of the 1980s to the limitations and disparities in accessibility of the 1990s.

In order to try to understand inequalities in wealth we first look at indicators of household wealth and consumption, which show that the roots of the low status for the majority of the population are to be found before 1990 (see also Voicu 2005: 100). The second part looks at the occupational structure and social inequalities related to unemployment and participation in the informal economy. The last part provides an overview of research on poverty, a phenomenon considered to be very serious and difficult to eradicate (around 1 million people are estimated to be in a state of chronic poverty, which was unaffected by social policies, Voicu 2005)

#### **2. 2. A. Wealth and living standards**

Starting from the evaluation of CASPIS, but trying to eliminate some ideological content and complete the argumentation regarding the economic processes

unsystematically referred to, it is possible to say that living standards were influenced by three socio-economic processes. First there is an expansion of earnings and consumption opportunities due to economic liberalization; second there is a diminution of financial resources a large part of the population and for extended periods of time because of the grave and prolonged transformational economic crisis; third, there is a phenomenon of exclusion and social disorganisation of a small section of the population due to long-term unemployment, deprivation and exclusion. Clearly, all this implies a strong polarization of the society in terms of material resources.

Higher and middle income groups have been increasing in size (UNDP 2005); concentrated in certain economic fields, occupations, and regions. This category is largely educated and urban though there are exceptions. When the outliers are excluded there is a strong correlation between education, occupation, urban residence and income as well as subjective assessment of living standards (Voicu 2005: 121).

Income discrepancies alone do not depict the whole picture of wealth based inequalities. People can have other material resources from rent, investments or shares. Moreover, some (categories of) people can have other income than wages, usually non-declared, such as from gifts (as teachers or doctors, or even state bureaucrats), or from working on the black market, without a proper employment contract, which will be briefly noted in the section on the informal economy.

In a cross-national perspective, based only on two simple indicators of lifestyle - living space in private accommodation per person and car ownership - Romania is placed very low (see table below based on Voicu 2005:18-21). Only Albanians live in smaller flats and only Moldova, Albania and Turkey (with an even bigger underdeveloped rural population) have fewer cars per 1000 inhabitants. (Voicu 2005: 18-21). These are to a large extent the consequence of the GDP per capita level in Romania as well as of the policies of the communist regime. The latter tried, for instance, to limit living space to max. 12 sqm per person, with families having more space being initially in the 50s assigned a tenant and from the 70s being taxed more for the additional space. The regime also limited car production for domestic use and waiting time for the delivery of a new car, after paying a deposit for it, could take anything between 1 and 5 years.

Also in a cross-national perspective Romanians use a significantly higher share of their incomes on food and basic needs, with obviously a lot less being left for anything, from education to entertainment in the family budget.

After 1989 the government ceased to address the issue of housing in terms of building new houses or condominiums to be rented or sold to individuals. In the first years of post-communist period the private sector invested modestly in real estate. According to a study on living conditions in Romania (Dan 2004: 12), 42.8% of the total population lived in houses under 14.2 sqm per capita, while 80% of the gypsy population lived in houses smaller than 14.2 sqm per capita. The space crisis is more evident in urban areas. In terms of number of rooms in an average house urban areas rank lower than the rural ones: 58% of the houses with only one room were found in urban areas, mainly as a consequence of forced urbanization during the communist period, which produces tiny apartments in condominiums with poor infrastructure like plumbing, sewage and heating (Dan 2004: 12).

Developing more comprehensive indicators of life style preoccupied sociologists in Romania too. Dumitru Sandu tried to adapt the CLSD (Current life-style deprivation) methodology from Whelan et al (2001) in the surveys for the Public Opinion Barometer. Bogdan Voicu, in turn, emphasizes the need to construct better indicators of life-style and actual household wealth through consumption and desired consumption. He emphasizes the subjective - individual oriented - well being in constructing indicators of life style, and not the economic, household oriented one (Voicu B. 2005: 15). At the individual level, building on the measurements in the public opinion barometer, he estimates that poverty “exploded” in Romania after 1989, with only 31% of Romanians considering themselves as being poor before 1989, and about 60% subjectively considering to have a poorer standard of living in democracy compared to the communist period, thus emphasizing the radical decrease in welfare during the transition period. (Voicu B 2005: 29)

**TABLE 2.1** Two indicators of material resources in Romania in a European comparative perspective (source: Voicu B. 2005: 18-21)

COUNTRY	Average house size per capita in squared meters			Cars at 1000 inhabitants		
	indicator	year	source	indicator	year	source
Romania	14,2	2002		131,5	2000	q
France	41,2	1991	a	465	1999	h
Germany	39,8	2001	b*	574	2003	b
Great Britain	31,9	1991	a	399	1997	o
The Netherlands	41,1	1991	a	398	1999	h
Denmark	48,7	2002	c*	345	2002	c
Norway	54,0	2001	d*	474	2002	p
Spain	25,3	1991	a	424	1999	h
Ireland	28,8	1991	a	346	1999	h
Greece	25,7	1990	a	312	2002	i
Belgium	34,5	1991	a	466	2001	j*
Italy	32,9	1991	a	544	1999	h
Luxemburg	41,2	1991	a	610	1999	h
Austria	34,0	1991	a	538	2002	k*
Portugal	-	-	-	330	1999	h
Turkey	-	-	-	62	1999	g
Slovenia	19	1994	e	438	2001	l
Czech Republic	25,5	1994	e	358	2001	l
Slovakia	21,9	1994	e	247	2001	l
Poland	18,2	1994	e	289	2001	l
Hungary	32,1	1994	e	259	2001	l
Bulgaria	16,7	1994	e	262	2001	l
Latvia	20,9	1994	e	266	2001	l
Lithuania	19,7	1994	e	341	2001	l
Estonia	32	1994	e	296	2001	l
Albania	8	1994	e	37	2001	m
Croatia	22,1	1994	e	280	2002	n
Macedonia	-	-	-	147	2000	m
Moldova	-	-	-	56	2000	m
Armenia	17,7	2001	f	-	-	-

Sources (as listed in\_Voicu B. 2005: 18-21).

## 2.2. B. Occupational Structure, Employment and Retirement

The main modifications of the occupational structure after 1990 include a dramatic increase in the number of pensioners (from 11,7% of the population in 1990 to 31,6% in 2003) and in the number of the unemployed (from 1,1% in 1990 to 5,6%, in 2003). There is also a diversification of occupations and the emergence of new occupations. It is noticed that, while the percentage of manual workers severely diminished from 50% in 1989 to 30% in 1999, the percentage of farmers with personal households, unpaid family members working in the family farm/business, and those without an occupation have significantly increased. A new occupational structure was thus established, more diversified than the one before and bringing about new inequalities. (*Source: CNS – The Romanian Statistic Yearbook, 1990 for 1989 and CURS test for 1999*).

In the occupational area, at the end of 1999, women represented 46.2% of the total employed population, which reflects a tendency to diminishing gender differences in economic activity.

According to the data in 1999, most women work in the following sectors of national economy: health and social assistance (78.8%); financial, banking and insurance activities, (71.3%); education (69.5%); hotels and restaurants (66%); commerce (55.4%); post-office and telecommunications (53.9%); agriculture (50.4%). (The Romanian Statistic Yearbook - 2000).

Women's salaries are constantly lower to those of men, even in those sectors where their percentage is 50%, the average difference of salaries between sexes being 8.5%. These inequalities of salaries seem to be preserved and conveyed to all social insurance rights, calculated according to the individual income.<sup>5</sup>

Regarding ethnicity, in the labour market, the Roma are often considered to be discriminated against, on top of their already disadvantaged status due to lack of education and formal qualifications. These latter issues do not apply to the Hungarian population. Mobility to Romanian-only areas by Hungarians may impair the advances in any spheres of the labour market, but most significantly Hungarians are unlikely to be found in the army or the police (Marko 1999). The potential explanation in our view is a mutual lack of trust, embedded by years of discriminatory policies of the Romanian state and nationalism on both sides. The largely unreformed nationalistic

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<sup>5</sup> The National Report regarding Equality of Chances between Men and Women, March 2002

culture of these institutions and of the government policies regarding state security plays a major role, but the perception of these institutions as oppressive agents of an alien state among Hungarians do not help the attempts of the UDMR (the party of ethnic Hungarians in Romania) to ensure some participation of Hungarian nationals in the police and the army.

### **Unemployment**

Research on Romanian unemployment revealed that the probability of becoming unemployed is much higher for those between 15 and 24 years of age, for the vocational education graduates, and people in urban areas (World Bank, 2003)<sup>6</sup>. In 2003, unemployment among youth (15–24 years old) registered the highest percentage – 31.4% of the total number of the BIM unemployed people (58.2% of men and 65.6% of women).

According to the National Institute for Statistics and Economic Studies, the unemployment rate among women between 1995 and 1999 has been higher than the general unemployment rate, although the percentage of women in the total number of the unemployed has registered a decrease from 55% in 1995 to 47% in 1999.

Regional differences regarding economic development and the labour force market situation determine an unequal distribution of unemployment. The North-Eastern and Southern parts of the country provide scarce chances of occupation for the population, irrespective of gender and education level, the unemployment rate being, consequently, higher in these areas.

It appears that, at least nowadays, a high level of education acts as an element of protection against unemployment (Poverty Map, ICCV), which does not however mean that a graduate will work in the area of its qualifications but simply that they are less likely to be unemployed.

### **The informal economy**

The average unemployment rate of the country has been under 12%, during transition, but has significantly varied from a geographical area to another, reaching 30% in some areas. Yet, the number of officially registered unemployed may seem quite low, but the estimations of the hidden unemployment and the illegal employment increase uncertainty regarding the real unemployment level (Stanculescu and Ilie 2001). The high employment in agriculture remained at roughly the same

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<sup>6</sup> *Romania – Evaluation of poverty, Vol. I, Main report*. World Bank document, October, 2003, [www.worldbank.org.ro](http://www.worldbank.org.ro).

level – 35% - after 1989. This economic branch concentrates the largest part of the informal economy as subsistence agriculture. (Stanciulescu and Ilie 2001: 9)

The informal sector includes ‘all the income-generating activities, not regulated by the state, in social environments where similar activities are regulated. The increase of the informal sector was prompted by the limited offer of employment and the low salaries in the official sector. (Stanculescu, 1989).

The most recent estimation regarding the informal sector in Romania has been made by the National Institute for Scientific Research in the area of Work and Social Support (NISRWSS).<sup>7</sup> The estimation places “general” or overall employment in the informal sector at a level between 20 and 27% of the labour force, respectively between 2.4 and 3.1 million persons. Other sources indicate a larger range between 16 and 40% of informal economy as illegal or quasi illegal for profit activities (Stanciulescu and Ilie 2001: 17). Several economy sectors have been marked by increased illegal labour force, like constructions and agriculture.

### **2. 2. C. Poverty**

Poverty was most probably a problem in communist Romania as historical accounts suggest that it was a problem of pre-communist Romania. Yet, the official position of the regime was that poverty was eradicated and there was equality among all citizens (Voicu B. 2005, Voicu M. 2005). Given the official position and the very strict control of any publications, there are no studies analysing poverty during communism and no reliable indicators. Moreover, given the peculiar fate of sociology during the Ceausescu regime, which was not allowed to exist as an academic discipline but only as part of the curriculum in scientific socialism and at the party school -, adding to the impossibility of actual public opinion research in the absence of freedom of speech, there are no subjective measurements. Therefore, although plausible for certain sections of the populations and certain areas, given the collapse of entire sectors of the economy and entire areas of the country, the assertion that poverty increased compared to 1989 cannot be backed with actual pre-1989 data. The comparison with 1990 is also partly misleading because in 1990 there were no economic reforms yet, there was still almost full employment, no excessive inflation, and a huge improvements in availability of consumer goods and in provision of basic

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<sup>7</sup> Cătălin Ghinăraș, *A different economy, a different labour force market*, 2003, NISRWSS, p. 13.

household needs (electricity, water, heating) was immediately apparent after the revolution in December 1989.

Hence, the sociological literature on the topic of poverty tends to give the impression that poverty is a post-communist phenomenon. Some analyses imply that 1989 was a high point in the nation's history with relatively high wages, low inequalities and virtually no poverty. The most that this literature and the policy reports of the same authors are ready to acknowledge is that probably poverty was slightly underestimated in 1989 statistics but not by much, being indeed close to the 7-8% estimate (Zamfir, Marginean et al 2001), and that the economic crisis did start in the 1980s, but nevertheless it was accelerated during the transition (Zamfir 1999). Bogdan Voicu, provides a more detailed and nuanced position; he considers that poverty (and decreases in real wages) had a similar trend in Romania as in other post-communist countries, i.e. an ascending trend or a descending trend in income, but the economic crisis lasted longer and the recovery started much later in Romania compared to these other countries (Voicu B. 2005: 103). To this it is necessary to note that actual major reforms were delayed, thus the beginning of an upwards trend much later in the transition.

**HOUSEHOLD TYPE:** Extreme poverty is present especially among households with many members. In 1998, 19% of 5 member-households and 35% of the ones with more than five members, a total of 1.6 million persons, lived in extreme poverty, having resources under 40% of the average consumption necessary per adult equivalent.

**GENDER:** The Gender Barometer (2000) indicates a significant income difference between men and women : on the investigated sample, the incomes of women are the equivalent of about half of men's incomes, while the percentage of women without income is four times bigger to that of men in the same situation.<sup>8</sup> Thus, a "feminization of poverty" can be observed (Miroiu M.: 1996, 1999; see also above).

**AGE:** .In 1997, the poverty rate was 18% for pensioners between 56–65 years and 10% for those over 65 years (National Statistical Office).

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<sup>8</sup> The Gender Barometer, August 2000, [www.osf.ro](http://www.osf.ro)

**Table 2.2. Regional trends in poverty**

	1995	2000	2002	2003	Difference with 1995	Difference with 2000	Difference with 2002
<b>North-East</b>	37.5	48.5	42.5	<b>35.4</b>	-2.1	-13.0	-7.1
<b>South-West</b>	28.5	34.5	32.5	<b>32.1</b>	3.6	-2.4	-0.4
<b>South</b>	27.6	40.0	33.1	<b>29.9</b>	2.2	-10.1	-3.2
<b>South-East</b>	26.3	38.4	32.3	<b>29.2</b>	2.9	-9.2	-3.0
<b>Centre</b>	23.9	31.4	23.4	<b>20.3</b>	-3.6	-11.1	-3.1
<b>West</b>	17.9	30.1	22.2	<b>18.1</b>	0.2	-12.0	-4.1
<b>North-West</b>	22.2	34.4	23.0	<b>17.7</b>	-4.5	-16.7	-5.3
<b>Bucharest</b>	10.2	18.2	10.6	<b>8.1</b>	-2.1	-10.0	-2.5

#### ETHNICITY

**ROMA:** Three-quarters of the Roma are poor and more than a half (over five times more than Romanians) live in severe poverty conditions. Trends regarding the Roma population differ greatly from trends regarding the rest of the population, which suggest clear marginalization. In 2003 Roma poverty rates were higher than in 1995, unlike for the rest of the population; they also register the lowest decrease in poverty of only two percent, two or even three times less than the other nationalities and the highest percentage of poor children – 80% (MCDIS 2005:17).

**Table 2.3. Differences in the poverty rate by ethnicity**

	1995	2000	2003
<b>Romanian</b>	24,7	34,7	24,4
<b>Hungarian</b>	21,9	31,2	14,9
<b>Roma</b>	73,9	83,0	76,8
<b>Other</b>	30,5	37,0	18,6

*\*Source: Life Quality diagnosis, ICCV*

**HUNGARIANS:** The diminution of the poverty rate from 2000 to 2003 is more pronounced among Hungarians than among Romanians. Studies do not provide

any explanations but external migration (mostly to Hungary) disproportionately among those who could not find employment in Romania can be a plausible explanation.

**ETHNICITY & REGION:** The Hungarians (Szekely) from the mountainous – and thus rather isolated and ethnically homogeneous - Szekely Country (Counties Covasna, Harghita and Mures) form a specific category, being poorer than the average Romanian citizen and their region poorer than the rest of Transilvania (Ionita 2006). According to the same study of the Romanian Academic Society, the two counties with an almost entirely Hungarian population – Covasna and Harghita – have only marginally more local tax revenue than the poor Moldovan counties of North-East Romania.

It has to be noted that the existing literature on ethnicity based inequalities is more often than not written from the perspective of the majority and is a political response to the proposals of the UDMR (cf. Ionita 2006, Tufis 2001).

#### **2.2.d. Inequality in educational attainment and access to education**

The right to education can be understood as the right of every individual to assimilate the skills, abilities and knowledge for finding a job, both a source of income and full integration in the social, economical, cultural, political etc. life of society (Neagu, 2004: 2) Pupils excluded from the educational system are not only considered victims of social inequality, but also socially expensive youth, due to the expenses of their education, professional integration and support through social assistance mechanisms (Jigau and Novak 2000).<sup>9</sup>

Inequalities in education are manifested through:

- Inequality of educational levels (see Table 1.5b and the comments afterwards);
- Inequality of educational units (see below); and
- Inequality among pupils as a result of the above as well as the impact of educational attainment on adult status (Neagu, 2003: 1-16).

Educational inequalities in Romania are based on a series of factors, not the least of which is a general poverty of the educational system. (Public expenditures for education have varied between 3 and 3.6% of the gross national product ever since

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<sup>9</sup> Mihaela JIGĂU (coord.), Cornelia NOVAK (coord.), Magda BALICA, Irina HORGA, Ciprian FARTUȘNIC, *Inserția profesională a absolvenților învățământului liceal și postliceal*. București: Institutul de Științe ale Educației, 2000, [http://arhiva.ise.ro/resurse/ise\\_00\\_ev\\_absolv.pdf](http://arhiva.ise.ro/resurse/ise_00_ev_absolv.pdf)

1989, and – in light of the great expansion of higher education since - were probably lower yet before). Despite the general domestic perception of Romanian education as very good due to the successes of Romanian students in the International Olympic Competitions for mathematics, physics, informatics and chemistry, there is clearly a very high standard deviation and elite successes do not reflect the average level of educational attainment. Bogdan Voicu (2005: 159) summarizes a series of international comparative tests in which Romania fares rather badly in all three tests being in the second half of the sample and on a decreasing path. At mathematics and sciences, if in 1995 Romania was at the same level with Lithuania, Cyprus, Spain and Greece, and better than Portugal, while in 1999, only Macedonia and Turkey had lower results, with Moldova at the same level (Voicu 2005: 160-161, TIMSS 1995, 1999). As it was mentioned in section I.2, there is an increase enrolment in higher education but the figures are still much lower than those for Western Europe or even for Russia and the Baltic States (WDI 2005, ILO 1996).

A recent study on the compulsory education system in Romania estimated that ‘the Romanian school system needs major investments (...). Only a shock budget and the affirmation of some mechanisms for the powerful stimulation of education investments can rescue the educational system from the immanent disaster’ (Vlăsceanu, 2002). Although Finance Ministry estimates suggest that investments in education have grown 2.5 times between 1990 and 1998, the unequal distribution of these investments is mostly affecting the poor communities (i.e. the rural and isolated communities that face unfavourable scales of economies in education), while contributing to the decrease in school opportunities for pupils coming from these areas. The underfinancing of the educational system is reflected both in the scarce endowment of schools and the poor infrastructure (the insufficient number of educational units, school transportation, hostels, and canteens) of some educational units. This situation leads to differences between the developed communities and the poor ones, differentiated mostly along the rural-urban axis, and are an important factor for the social exclusion of the poor population.

Qualitative research from the rural areas<sup>10</sup> demonstrate the polarization of access to education, as the endowment of rural schools in, in most cases, inferior to that of urban schools. The old furniture, the highly damaged buildings, the lack of

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<sup>10</sup> For instance, the research supported by the Education 2000+ Centre fundation and the Ministry of Education and Research, in February-March 2002.

water in schools, the lack of laboratories and physical education halls, the lack of teaching aids and computers (or the insufficient number) disadvantage the rural areas, in comparison to the urban ones. Moreover, the existence of human resources problems (commuting, the dissatisfactory qualification and fluctuation of teachers) in the rural areas increases the rural-urban polarization. (Jigau, 2001)

The low level of education of parents of pupils from rural areas and, consequently, their lack of involvement in the school problems is reflected in the degree of family support for children (Jigau, 2001: 84). Moreover, unlike urban areas, pupils in rural areas are disadvantaged by working in agriculture, in or outside households, with their families. Consequently, the time and effort for studying is severely diminished, in comparison to those of pupils from urban areas. These problems of rural education contribute to the decrease in the chances of access to superior education for pupils, being sources for the creation and maintenance of polarization among social groups involved in the rural and urban education (Vlasceanu, 2002: 37).

While this is hardly a new phenomenon, it is also worth to note that in poor communities, the number of qualified teachers is lower than in the better developed communities. Also, the profile of teachers tends to be polarized, depending on their age: the majority of rural teachers are either young or at the end of their careers, the first group being constantly tempted to abandon the educational system, due to its lack of appeal. (Jigau, 2001)

The main obstacle of the equalisation of chances of access to secondary education is the distribution of the educational network (only 185 high schools out of 1295 are placed in rural areas, almost all of them having agricultural profiles). (Vlăsceanu, 2002). The level of qualification provided by compulsory education, different from a school to another, is the second obstacle of ensuring equal opportunities. The majority of high schools, vocational schools and apprentice schools are placed in urban areas or in large villages, meaning that the graduates from rural areas are obliged to undertake additional education costs: accommodation, transportation, meals etc. Under these circumstances, the fact that many gymnasium graduates from rural areas drop off education is not too surprising (Vlasceanu, 2002).

Of course, free education was also more a myth than a reality in communist times. Hidden costs were presented by stationery, books and the need for private tutors in order to pass the highly competitive admission exams at secondary level (one

after 8 years of education and one at the end of the 10 years period of compulsory education) and university. But most of these costs – probably most notably those of dormitory rooms for high schools - went up significantly since 1990. Rural families would have to pick up even more of these costs (Jigau, 2001). Therefore, it is more difficult for poor children from rural areas and even from small towns to go to the better high schools in the urban areas, irrespective of their educational achievements and potential to pass the admission tests.

A limited ability of the current system to solicit private contributions remains a further factor in the low quality of public education in Romania. What little private contribution there is tends to quite unequally distributed across social strata which makes the social distribution of educational goods even more unequal. The Law on Education stipulates free education for all, meaning the payment of salaries for teachers from the state budget, the complete public financing of the pre-school education costs, the co-financing of support of children under school-age and pupils in boarding schools, hostels and canteens, the co-financing of some out-of-school activities, the grant of social and merit scholarships, reduced public transportation fees for students and so on.<sup>11</sup>

Field research reflects that the families of pupils must nonetheless overcome high expenses: exercise books and other study materials, food, transportation and accommodation expenses, sometimes expenses for out-of-school activities, school upkeep, teaching aids (the class fund/the school fund) and occasional semi-voluntary gifts for teachers can create a significant financial burden.<sup>12</sup>

This burden is highly relative, however. Average education expenses from household budgets are actually very low, reaching, in 1999, only 3.4% of the total consumption expenses of the total number of households: 4.9% in wage-earners' households, 1.6% in peasants' households, 2.3% in pensioners' households and 3.2% in households of the unemployed, suggesting that those spend least who would need to spend most to make up for the deficiencies of the local schools. The percentage of education expenses varies with the number of children in a similarly counter-intuitive way: 4.3%, for families with one child, 3.9%, for those with two children, 3.1%, for three children families and 2.6%, for families with four or more children. (Panduru,

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<sup>11</sup> Legea nr 84/1995, republicata in M. Of. 606 din 10.12.1999, Legea invatamantului

<sup>12</sup> Mihaela JIGĂU (coord.), Florentina ANGHEL, Ioana MANOLACHE, Adela Luminița ROGOJINARU, Viorica BEIU , Studiul : Învățământul în zone defavorizate. Strategii și alternative educaționale. Institutul de Stiinte ale Educatiei, [http://arhiva.ise.ro/resurse/ise\\_96\\_ev\\_zd.pdf](http://arhiva.ise.ro/resurse/ise_96_ev_zd.pdf), 1996.

Molnar, 2001). The likely implication is that in peasant families and large households the private spending per pupil is much lower not only in absolute but also in relative terms than among the financially better of non-agricultural and smaller households.

Income and human capital discrepancies are also reproduced at regional level. The richer counties, concentrated in Transylvania and the north of Muntenia– Timiș, Arad, Cluj, Sibiu, Brașov, Prahova, Argeș, București - also represent the regions with the highest educational attainment, whilst in the poorer Moldova only one county – Galați – is above the national average (see Sandu 1997, 1999). These counties (see also Voicu 2005: 164) have higher rates of urbanization, less agriculture as well as all but the one of the biggest university centres in the country.

As far as the access of ethnic minorities to superior education is concerned, there are subsidies and tax dispensations aimed to facilitate Roma access to higher education and labour market integration.<sup>13</sup> The percentage of Roma children aged 7 to 16 enrolled in education appreciably increased from a rather low 50,6% in 1992 to 61.4% in 1998; officially, at least, there was also a decrease in the ratio of Roma children who never attended school, from 26,3% in 1992 to 17,3% in 1998<sup>14</sup>.

As Table 1.5b demonstrated, this present situation in the education system polarizes the young generations in two segments: those who attend and graduate from superior education, and thus get professionally and socially integrated, and those who cannot attend and graduate from such a form of secondary education (or do not even graduate from primary school or gymnasium), but acquire an intermediate examination diploma instead. For secondary education (including vocational), the rate of coverage registered the highest decrease of all education forms, the most affected being the pupils from rural areas. The percentage of youth with no diplomas other than those from the intermediate examination represents about 15–16% of recent schoolgoing generations.<sup>15</sup> (MEC, INSSE) Though on a higher absolute level of education, this least educated group is slightly bigger than its equivalent (those who did not complete primary education) in 1990, while at the same time the top group of university graduates also increased greatly (cf. Table 1.5b).

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<sup>13</sup> H.G. nr. 445/08.08.1997 See also the '*Program Twining (de înfrățire instituțională)*' PHARE 2002: RO2002/IB/OT-02 '*TL Acces la educație pentru grupurile dezavantajate*'.

<sup>14</sup> Baza de date Institutul pentru Cercetarea Calității Vieții, 1992, și Romii 1998, Institutul pentru Cercetarea Calității Vieții

<sup>15</sup> Legea nr 84/1995, republicata in M. Of. 606 din 10.12.1999, Legea invatamantului

Overall, social inequalities of education increased over the 1990s by the simple fact that the variance of education attainment did in the younger generation. There is no hard evidence in published sources that the correlation between scholastic achievement and social background increased over the decade, but this is likely to have been the case. On the one hand, private education appeared in the 1990s and poor families/youth are generally neither willing nor capable of paying the tuition of private universities. On the other hand, social student scholarships and subsidies became less widely available in public education (Jigau, Surdu 2002).

Whether access to higher echelons became more selective is not entirely obvious. The major expansion of higher education in the 1990s implies the opposite. Moreover, the idea of selection and competition has been part of the education system during communism as well, so any change had to be rather muted in any case. It was only in the early days of the communist regime (1950s) that access to higher education was based on social origins, with quotas for each category promoting both positive and negative discrimination of selected strata. Until the 1960s, initially for all fields and then for specific fields of study, access was made less competitive for those from disadvantaged backgrounds - with parents from the working and peasant classes and those who themselves were workers or 'rural/agricultural workers'. The late 80s saw a different type of policy and thus discrimination: for sensitive domains, such as law or philosophy, children of non-party members were formally and informally discouraged from applying. Competition for access was made formally equal to all though, leading to an increase in access to higher education for those born 1946-1955. In the following periods the number of places in higher education did not increase while both the population and the number of high school graduates did, which led to an increase in competition and an even higher reliance on family resources for access to higher and even secondary education. This leads to the generational differences noted by Voicu (2005: 166-167)

The trends in the intergenerational transmission of education inequalities can probably be best explored with the EUREQUAL data itself, since no readily available alternative source provides much of a comparison between the years around 1990 and the contemporary era. Clearly, however, a very close correlation does exist between parents' and offsprings' education. The 2003 Public Opinion Barometer reported the following relationship between these variables, with rank correlations of  $\tau$

(Kendall)=0,498 and  $\gamma=0,646$ . (see Table 2.4.a.)

**Table 2.4.a. Relationship between parent's education and maximum level of education. (Romania, 2003)**

<i>Educația subiectului</i>	<i>Nivelul de educație al celui mai școlit părinte</i>						Total
	cel mult 4 clase	gimnaziu	școala profesională / treapta I de liceu	High school	College/ Vocational School	Graduate/ Post-Graduate	
cel mult 4 clase	27%	3%	1%	2%	3%	0%	14%
Gimnaziu	29%	19%	7%	2%	0%	0%	20%
școala profesională / treapta I de liceu	26%	31%	26%	7%	12%	0%	25%
Highschool	11%	28%	38%	37%	22%	21%	21%
College/ Vocational School	5%	12%	19%	23%	29%	15%	11%
Graduate and Post-Graduate	2%	7%	10%	29%	35%	64%	9%
Total	100%	100%	100%	100%	100%	100%	100%
	46%	28%	12%	7%	5%	3%	100%

Source: BOP-FSD poll, October 2003. The data exclude respondents below 25 years of age

As the table shows, about 46 percent of the adult Romanians have parents with at most 4 years of education, and of these only 2 percent earned a university or college degree. The chances of getting such a degree were about fifteen times higher for the 12 percent of the adults whose parents finished lyceum or college, and 32 times higher for the two percent whose parents had a university degree. Clearly, some of these striking differences are spurious and merely reflect that younger (and thus better educated) people have younger (and thus better educated) parents. (see table 2.4.b.)

Clearly, the exact relationship between parental background and educational attainment, and especially the way it changed over the 1990s awaits more detailed statistical analysis. However, Table 2.4.c. shows that differences in education attainment do indeed have tangible consequences in contemporary Romania, with the median income being about eight times higher in the most than in the least educated groups in society.

**TABLE 2.4.b. Generations and level of educations**

Level of education \ Birth date	before 1924	1925-1932	1933-1945	1946-1955	1956-1965	1966-1975	1976-1978
Graduate and post-graduate	0,3	-2,2	-1,3	<b>2,5</b>	-2,5	0,8	<b>4,5</b>
College/ Vocational school	-2,0	-1,6	0,4	<b>2,7</b>	0,5	-1,3	0,3
Highschool	-2,9	-3,6	-7,3	-1,3	<b>4,1</b>	<b>9,2</b>	1,4
Highschool unfinished	-5,0	-3,9	-3,9	1,6	<b>5,8</b>	<b>3,4</b>	-1,0
Gymnasium	1,2	<b>4,6</b>	<b>4,2</b>	0,3	-3,2	-5,6	-1,1
Primary	<b>9,8</b>	<b>7,0</b>	<b>9,3</b>	-5,3	-6,7	-8,0	-3,1

\* The cell entries are adjusted standardized chi-square residuals. Values higher than +1.96 indicate positive associations significant at  $p < 0.05$ . Values lower than -1.96 indicate negative associations significant at the same level. (Meaning that among those born between 1946-1955 there are significantly more higher education graduates than among the rest of the populations).

Source: Voicu 2005, Table 4.5. BOP-FSD, October 2003. Includes only those over 25 years old in order to reflect the situation of those who are above the age of finishing their studies.

**TABLE 2.4.c.. Relationship between education and income at individual level, Romania**

<b>Highest educational qualification</b>	<b>Net monthly personal income in million lei (September 2003)</b>				
	Average	Median	Max	Standard Deviation	Variation coefficient
<i>No schooling</i>	0,7	0,5	2,5	0,7	106%
<i>Primary (4 yrs) education</i>	1,2	1,0	8,0	1,1	91%
<i>Gymnasium (8 yrs)</i>	1,6	1,4	10,0	1,4	87%
<i>Gymnasium + exam giving entry to secondary education</i>	1,9	1,8	12,0	2,0	103%
<i>șc. profesională /de ucenici/ învățământ complementar</i>	2,5	2,4	12,0	1,8	75%
<i>High school</i>	2,6	2,5	35,0	2,9	111%
<i>Some post-secondary education</i>	3,9	3,0	20,0	3,1	80%
<i>College degree</i>	5,2	4,5	20,0	3,9	75%
<i>University degree</i>	5,2	4,0	25,0	3,8	73%

Source: Voicu 2005, Table 4.4. based on BOP-FSD, October 2003.

### 2.3. Inequality in health and access to the healthcare system

Obvious features of the population categories socially excluded from the medical system are: low incomes, a relatively low level of education, a precarious health, scarce access to services, as a consequence of the residential placing, a minority ethnic or professional status (Dobos 2003: 2-4). Social exclusion can

sometimes be a consequence of a person's low capacity to identify his/her own needs, concerning either their own health or their priorities. Thus, the reasons for social exclusion from access to medical services have many generating factors and are not always correlated with poverty per se (Dobos 2003: 2-4).

Romania had an exclusively public medical system in 1990, highly centralized, financially supported by the Health Ministry and its district medical inspectorates. Services were provided to the population, officially free of charge, but the severe under-financing of the system for a long period of time led to a decrease in the quality of services and a transfer of a percentage of their cost to the population. Many clinics and hospitals operated in deteriorated buildings, without proper technical endowment, and insufficient amount of medicines and medical supplies. Thus, a percentage of the costs of treatments were transferred, directly or indirectly, towards the beneficiary, even through informal payments to the medical personnel, this resulting in the limitation of access to medical services of certain population segments. (Dobos, 2003: 2-4).

The low quality of services and system shortages, due to the small budget, imposed some decisions, aimed at the improvement of public medical assistance in Romania. The switch to a pattern based on health insurances was estimated by the decision-makers, at that moment, to be the best solution for many systemic problems. (Chiritoiu 1998) As a consequence, the organisation, financing and provision of public sanitary services to the population were modified since 1996, from a legislative standpoint, while effective transformations occurred starting in 1999 (Chiritoiu 1998).

Medical services are presently provided according to the contribution to the health insurance fund (6.5 % from the gross income of the employee and 7% from the employer). Through these monthly contributions, the insured is entitled, free of charge, to a package of services defined as vital and legislatively regulated. Primary medical assistance is, presently provided by the family doctor, the intention being an emphasis of the role of primary services, as a first problem-solving filter. The access to ambulatory and hospital assistance (except for emergencies) and the access to compensated and free medicines are mediated by the family doctor. The doctors are no longer state employees, becoming medical service suppliers, under contract with the House of Health Insurances, the new system coordinator.

The new pattern has led to a further decrease in population access to medical services, through the arrival of persons who cannot benefit from medical assistance (besides the urgent, minimal one), because of lack of health insurance. Secondly, there are features inherited from the former system, still unsolved, causing the reduction of access to the necessary type of medical services or their decrease in quality: the absence of primary medical assistance in some rural places, the existence of deteriorated or scarcely endowed medical units, the small salaries of the medical personnel, the habitual practice of the informal payment for medical services of the sick person (Dobos, 2003, p. 2-4). Inequality related to social status and social capital adds to this pattern since 'connections' (and not necessarily bribes) can solve problems of timely access or access to the best equipment.

According to the 2002 Census data, the percentage of population not registered to a family doctor is 5%. Persons without insurance appear to belong to the following segments:<sup>16</sup>

- professionals who are not employed in the formal labour market;
- poor families from the urban area, not covered by social support. The segment of the poor with an acknowledged right to social support should, theoretically, benefit from medical insurances. These people are facing a different problem, though: additional costs for the demand of medical services. Extremely expensive medicines are severely limiting their access to consumption ;
- poor families from the rural areas (a significant percentage of the peasants with incomes from subsistence agriculture);
- a part of the Roma population;

In the case of lack of an employment contract, the person can independently sign an insurance contract with the National House for Health Insurance. Financial resources are still a problem to the category of day-labourers or those who are paid in products, although these persons have an increased need of medical assistance, facing a higher risk of illness, due to inadequate working conditions.

According to the data in the health services census, more than half of Romanians do not know their rights and obligations concerning medical insurance, while 80% of those insured have no information or are only vaguely informed about

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<sup>16</sup> Source: The Opinion Census concerning health services, Romania, 2002, 2003, The Centre for health policies and services

the medical services they are entitled to. The dissatisfaction of the population with the quality of the public health system decreases the degree of confidence, leading to a decrease in addressability. This aspect, doubled by the lack of necessary incomes for the procurement of prescribed medicines or the over-payments asked by the medical personnel can explain the preference of poor or scarcely educated groups for the self-appliance of treatments, without medical consultation. In rural areas, the difficulties of travelling long distances to reach a doctor in time determine the use of traditional remedies. This is however, according to one former Minister of Health, one reason for which the system did not collapse yet (Chiritoiu 2007).

A significant number of persons, although insured, have limited access to medical assistance, because of the low household income. Poor families cannot afford the payment involved by the demand of medical services and the acquisition of necessary medicine, the payment of transport costs and the extra-payment for the doctors and auxiliary personnel. To 40% of the rural population, means of transport and their costs represent a problem of medical care access, outside of their localities. Also, the payment of auxiliary personnel and the waiting time are seen as obstacles, both by those from rural areas and those in urban areas. (*Source: The Opinion Census concerning health services, Romania, 2003, The Health Policies and Services Centre [www.cpss.ro](http://www.cpss.ro) – last accessed April 28, 2007*).

### **SECTION 3. SOCIAL INEQUALITY AND NATIONAL POLITICAL CULTURE**

#### **The elusive inequality: avoiding both communist wooden language and policy content**

Social inequalities in general have not been a very salient topic in national discourse. A search in the main news portal (<http://www.hotnews.ro>) as well as on the three main newspapers (Evenimentul Zilei, Cotidianul and Gandul), including articles for the last four-five years, for the word(s) inequality, social inequality gives a one-digit number of articles for each of these media outlets. A search for poverty fares somewhat higher, although a lot of the articles refer to poverty abroad, poverty of the Roma, or poverty of individual families (human interest stories).

There are perhaps two main reasons for which this is the case.

First, there has been, similarly to the case of other countries, acceptance of market economy and its consequences, even if in discourse some leaders of the left (FDSN-PDSR) did suggest a mix of market and state. Moreover EU accession and western or European integration also required Romania to improve its economy in order to meet accession criteria. Moreover, the legitimacy problems of the ex-communist government party FDSN and then PDSR in the immediate post-transition years (cf. Birch et al 2003) led to an increased emphasis to conform with economic reform expectations of the West and of the IMF, thus to a constant focus on the economy as the main factor in the improvement of living standards on the long run, with inevitable social costs during the process of transition (Dan 1998, Zamfir, Marginean et al 2001)

Second, at the level of public discourse, politics is very much dissociated from policies. The programmatic commitments of parties are very weak (Kitschelt et al 1999, Popescu and Stefuriuc 2003). There is a very big gap between the space given in the media to trivial scandals and conflicts between individual politicians, and discussions related to any substantive topics. Even more surprisingly personalization increased over the years (Stefuriuc 2004). The usual explanation that such topics do not have news or entertainment value is generally contradicted by the fact that surveys over the years show that until 2004 the main concern of all Romanian citizens were salaries/income and health considerations (Berevoescu et al 1999). The findings were similar with respect to the Hungarian population in Romania, somewhat surprisingly given the usual focus on their minority rights (Culic et al 2003).

Political science journals rarely if ever cover any analyses related to (domestic) policies and virtually never on topics of inequality, not even in terms of representation or the welfare state. A lot of the research on social policies, poverty and most recently on corruption and migration is related to consultancy commitments and just transpires in their research output (see Zamfir, Marginean *et al* 2001, Marginean 2001). An important point that comes out from Miroiu (1999) and to some extent Zamfir, Marginean *et al* (2001), is that the main lines of contention between the right and the left in terms of inequalities and need for redistribution refers to property and restitution (of nationalized properties during communism). It is indeed the case that the PSD (as well as the PRM and to some extent the PD until 2004) associated themselves with the plight of tenants of formerly state owned flats returned to their pre-1951 owners. Even the PSD accepted the principle of compensation of

former owners and to the extent possible of restitution but in the view of the PSD the tenants had precedence in buying the house at low prices significantly under the market value. This again clearly suggests the actual irrelevance of the issue of inequalities and the cover up of personal interest as social justice, all in the context of almost any policy proposals on social injustice related to access to education for children in rural areas, or in access to healthcare of the poor and less educated, or to access to housing more generally, which was the self-proclaimed priority of the PSD.

There is virtually no research analysing social inequalities as represented in the media and public discourse. An indication of the generalized interest in politics but not policy or ideas is given by the usual topics chosen for media monitoring either by the Broadcasting Overseeing Board (CNA) or by the specialized NGO the 'Media Monitoring Agency'. Even at election time, content analysis on specific issues is not undertaken. The only exceptions as substantive political topics monitored have been corruption, minority discrimination and Roma issues, probably due also to outsider – foreign funding bodies interest (MMA 2000, 2001, 2002, 2003). The rest are looking only at partisan bias operationalized as the ratio of appearances of various individual politicians (see MMA 2004, 2005).

Since there are no systematic analyses of the common ways in which class differences are expressed linguistically, one needs to mention the talk on a desire for the creation of the middle class. This discourse is probably present throughout the whole post-communist period. There is virtually no mention of class, in public discourse or in a lot of the social science research. The only instance when class is mentioned, in a pejorative way is in reference to the 'political class' perceived as remote and closed, thus the use of the word class (Hatieganu and Popescu 2007). President Ilescu, whose communist and Marxist past represented a problem in political competition given the negative image of the communist regime (at the time), quickly reviewed his style to avoid as much as possible terms used and thus devalued during communism (such as workers, working class, social injustice). At the same time he made "being poor but honest" a central part of his political image. Most recently, and especially during the campaign following the impeachment procedure, President Basescu, in his anti-corruption speeches refers commonly to media moguls, oligarchs and the interest groups of the rich as his main enemies in the fight for a renewal of the political system.

## Perceptions of inequality

According to Badescu (2003) based on the Public Opinion Barometer, a regular survey of the Open Society Foundation since 1995, 60% of Romanians perceive their society as one with deep and big inequalities, with a majority of poor and a tiny minority of very rich (Badescu 2003: 2). Yet, among the perceived sources of poverty, in an open ended question, laziness fares highest at 20%, followed by coming from a poor family at 15% and lack of state support at 14.4 (Badescu 2003, BOP 2003). However, if one groups the social characteristics as perceived reasons for inequality then 28.7 consider that the reasons of poverty are concrete social characteristics (education, social origin in a poor family or locality, lack of education or professional qualification), whilst another 11.2% consider that lack of connections as a reason of poverty. Injustices in society are also seen as a cause by 11.6% but also superstitious elements such as luck (5.4%).

### **Table 3.1. Why do people live in poverty?**

*Source: Badescu (2003)*

<b>People live in poverty because</b>	
They are lazy	20.10
Come from a poor family	15.00
The state does not help them	14.40
Because of the injustices in our society	11.60
No connections	11.20
Lack of education	5.90
Are devoid of luck	5.40
Lack of professional qualifications	4.80
Come from a poor locality	3.00
Other people do not help them	1.40
Too many children	1.10

As Bogdan Voicu (Voicu 2005:105) notes, surveys using a dichotomous variable for self perception of poverty in the early 90s registered that 50% of respondents considered themselves as poor (49.4% in 1991, 48.3% in October 1992, 58.6% in March 1993, 45.8% in July 1994 - ICCV 1991, 1992, 1993, 1994); a similar percentage (49.6%) was registered in when the question was asked again (ICCV & UB 1998). For a longer discussion of self perceptions of poverty and wealth see Voicu B 2005: 112-116. More interesting however is the relationship between actual income and perceptions; as the table below suggests that the higher the income of the household the less deprived and poor the person feels.

**Tabel 3.2. Relationship between household income and self-placement on the rich-poor axis**

Income decile of the household	Self-placement on the rich-poor axis (10-point scale)						
	1 poor	2	3	4	5	6	7-10
1	<b>11,2</b>	<b>2,6</b>		-2,3	-6,1	-2,0	
2	<b>6,4</b>	<b>7,5</b>			-5,5	-4,0	-2,5
3	<b>3,1</b>		<b>3,1</b>	-2,7		-2,3	-2,6
4							
5							
6	-2,6			<b>2,6</b>			-2,2
7	-4,6	-3,3	<b>3,2</b>		<b>2,3</b>		
8	-5,1	-2,4	-2,3		<b>6,4</b>		
9	-5,1	-3,8	-3,2		<b>3,6</b>	<b>4,5</b>	<b>3,4</b>
10	-4,0	-4,3	-4,0		<b>3,3</b>	<b>6,1</b>	<b>7,4</b>

**LEGEND:** “The table represents the values of the adjusted residuals for the cells where it has values significantly different from 0 at a .05 significance level. Positive correlations are bold. Negative correlations are lighter. Categories 7-10 of the self-placement scale were collapsed due to the low no of cases. The income deciles are determined by the distribution of households in the sample (N=1747).”

**SOURCE:** Voicu 2005, Table 3.7 based on BOP-FSD, November 2003.

According to the European Values Survey data from 1999 57% of Romanians think that differences in income should decrease/be lower (Voicu M. 2005), finding largely reproduced by Badescu (2003) using a rather different question. Only the salaries of directors of big companies are perceived as just about right, with no increase considered necessary by the respondents, while for members of parliament a decrease in salary with almost 50% was considered necessary. All respondents considered that people in their profession (calculated indirectly, not as a direct question) should basically have twice as much as at the time of the survey. The same survey also suggests that Romanians believed in 2003 that inequalities would be lower in ten years time, with the structure of inequalities being close to that from 1990 but even less unequal, which suggests a somewhat unexpected dose of optimism (Badescu 2003: 2). Interestingly, the study also finds that there is no significant correlation between views on need and method of reduction of inequalities and party preferences and that taxes are not perceived as appropriate means to correct inequalities, which is different from the declared positions of the parties in 2004 (Badescu 2003: 6).

## **SECTION 4. SOCIAL INEQUALITY AND THE NATIONAL PARTY SYSTEM**

Two points follow directly from what the previous section noted: (a) social inequality as such (as a principle or idea) as well as in respect to most of its different manifestations and causes, possibly with the exceptions of poverty and corruption, features very little in public discourse, and thus in the competition for political office among parties and presidential candidates; (b) political competition is largely devoid of policy content, most economic or social policy issues being covered largely at a declarative and symbolic level, partly in relation to the communist – anticommunist divide and partly related to the strong partisan identities built in the early 90s on symbolic (salience of anti-communism or not) and personalistic (anti or pro Iliescu) grounds. It has to be noted that Romanians are an interesting mix of rejection of politics (only 19% trusting the parliament, although institutions such as the church and the army fare very high and relatively few people compared to other countries feel represented by a political party) and high partisan attachment (a rather high percentage of people considering themselves close to a political party (50% and 45% in the two waves of the CSES surveys in Romania). For the complete comparative data see Toka 2006, Popescu and Hatieganu 2007. Moreover, although the party system may look rather balanced over a longer time span, within particular period's polls and votes have always showed a clear dominance of one camp over the other with the party considered to be the former communists in a dominant position as the biggest party throughout the period (Soare 2004, Popescu and Stefuriuc 2003).

With the caveat that there is a limited relevance in party competition of the party programmes in Romania, which are rarely really referred to as pledges or for accountability reasons in the media, the section will first briefly present the positions of the parties on a number of issues relevant for social inequalities as derived from their programmes. Second it will look at the actual place of these positions in party competition and third we will critically refer to the interpretations given to the salience and justification of these stances in party competition by the existing literature.

### **4.1. Political parties and inequality: an over time perspective**

The period 1990-1995 is considered to be a path to ideological clarifications through quantitative and qualitative changes in party programmes (Zamfir 1999: 584), which began to include sections on social issues and a focus on specific domains of

social life: problems of the youth, of the elderly (Voicu B., Voicu M, 1999: 587). It certainly is a change in the number of topics covered, and a slight change of tone compared to the extremely bombastically declarative party manifestos from 1990.<sup>17</sup> Yet, specific policies or even policy commitments for certain types of welfare benefits are rare, for reasons that are hard to disentangle but will be noted in sub-section IV.2 below.

The overview in this sub-section will try to show that the content remains largely declarative and that although the emphasis occasionally falls on tackling specific types of inequalities, but with a prevalence income inequalities (largely the excesses of the rich and the problems of the pensioners), healthcare shortages and those kinds of inequalities that may give international respectability to a party (gender, minorities, disabilities), whilst in fact little interest exists at the party level for these policies. Most importantly, the programmes do not include specific references to welfare policies regarding access to healthcare, education, pensions, unemployment benefits. Apart from the PRM (Greater Romania Party) no party promises full coverage and full state paid welfare services.<sup>18</sup> This is an important and quite striking aspect is that if in the early 90s the FSN-FDSN talked of social protection in general terms suggesting somehow a state only model, over time the main parties converged in supporting the move from social public services towards a mixed system (with PNL 1997). The target domains are health and social insurances. Access to welfare is based on participation in the labour market, including being registered as unemployed. Means testing is the general principle and there is no free access to healthcare and pensions except emergency healthcare and in case of the disabled .

Moreover, all parties (i.e. all mainstream parties, excluding the PRM) see economic development as the main route to a rise in living standards and fiscal policies and the means to achieve the development and consolidation of a middle class. Although the liberals (PNL) assign more role to the market and in the

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<sup>17</sup> For instance the manifesto of the FSN (National Salvation Front), the eventual winner of the 1990 elections has as main objectives in social terms ‘the radical improvement of the food, clothing and goods supply for the population’, ‘the diversification of services, the guarantee of minimum incomes, unemployment benefits equal to the minimum incomes, the gratuitousness of basic medical services’ (The Action Platform and Action Proclamation, adopted in the National Conference, 7-8 April 1990)

<sup>18</sup> The programme as well as all public appearances of the PRM lack in applicability and concrete content, therefore it is hardly relevant to refer to any specific stances.

governmental programme (2005) the Tariceanu government emphasizes the rule of law and respect of individual rights (including property rights), all parties consider that welfare programmes are important means to increase equality (of chances). All parties proposed in the 2000 and 2004 revisions of the tax system especially regarding wages and some of the employers' payroll taxes, all considering necessary some form of alleviating the taxes (i.e. lowering) and this would become one of the central topics at the 2004 elections as it is noted below.

Regarding pensions all parties promise to address the issue of low pensions and poverty of people who retired before 1989 or in the early 90s in order to make it possible to compensate them (at least to some extent) for the impact of the high inflation of the 90s. Similarly pensions for former CAP (i.e. communist time cooperatives in agriculture - colhoz) are noted by all parties as a priority (yet to be solved), therefore it will not be repeated for each party below. Specific policies are again rarely conveyed to the public and no debate takes place about an increase in equality of chances in terms of access to education and/or methods through which to ensure/promote better access to better schools and higher education for children in rural areas or from poor families, noted in Section II as main channels of inequality.

#### **FDSN-PDSR-PSD**

1992: Social policies focus on health, primary education and the status of pensioners. Special attention is paid to women: the creation of a 'governmental body especially dealing with the problem of women and family', as well as the introduction of 'employment pensions' for women with more than 25 years of work. (p.55)<sup>19</sup> Policies addressing child protection and family protection are both missing. (Zamfir, 1999: 593).

1996: Includes a mention of the role of equality: "equality is not an abstract concept, because people's liberty cannot exist in the absence of their equality. To us, it is associated to the refusal of social polarization, poverty and motivation limitation brought about by the inequality of incomes. (p. 24-25)<sup>20</sup>. Social polarization is seen as a controllable 'game of transition', economic development, increase of real wages, through the 'formation of a middle class of

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<sup>19</sup> FDSN- '92: Building together Romania's Future, the Program Platform of the National Salvation Front, The National Conference, Bucharest, 28-29 June 1992

<sup>20</sup> The Program Platform of the Social Democracy Party of Romania, adopted after the PDSR National Conference, 24-25 November 1995

landowners' (p.12-14)<sup>21</sup>. The 1996 electoral offer develops 21 sectoral programs<sup>22</sup>. Unlike 1990-1993, when unemployment was accepted as an inescapable reality (Zamfir 1999: 600), now the agenda includes policies of professional conversion of the unemployed and special programs of encouraging employment. For instance, a proposal was subsidised salaries for the young during the first year after graduation and a special fund for social houses for married youth under 35 years old. (p.32-37)<sup>23</sup>. In opposition after 1996, The Alternative Governing Program..." states that social protection must be mainly ensured by the state (PDSR 1997b, p.31)<sup>24</sup>

2000: seven sections refer to social policies: Equality of chances, Social policies, the Increase of incomes, Employment of labour force, Disadvantaged categories, Health.

2001: the programme has as major objectives the elimination of extreme poverty and the fight against poverty. PSD Government launches CASPIS ..... *Planul Național Anti-Sărăcie și Promovare a Incluziunii Sociale* [www.caspis.ro](http://www.caspis.ro)

2003: The PSD manifesto considers that there are three levels of welfare: (a) firstly the individual is responsible for his/her own welfare; (b) a partnership between citizens, economic actors and the state in order to solve situations that escape individual control; (c) the state in charge to ensure equal chances to citizens and to offer social protection to those in need. The focus falls on three categories of people and policies destined to alleviate their disadvantaged status: the elderly (social protection of retired people, higher pensions), women (on domestic violence and sexual abuses) and the young (support for companies that hire young people/recent graduates as above)

2004: PSD + PUR alliance follows similar lines with the 2003 PSD programme

- Policies concerning the equality of chances focus mostly on women in the labour force, unemployment and reinsertion as follows: (a) the creation in 2005 of *The National Agency for Equality of Chances among Men and Women* in order to combat inequalities of treatment between women and men wage-earners of the labour market, due to the

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<sup>21</sup>Ibidem

<sup>22</sup> The Social Democracy Party of Romania: electoral offer: 21 programs for Romania, October-November 1996

<sup>23</sup> Ibidem 11

<sup>24</sup> The Alternative Governing Program of the PDSR to the CDR-USD-UDMR Government, September 1997

mentalities and behaviours both of employers and the representatives of administration. The preparation of qualified personnel for the implementation of policies in this area and a national system for the support and promotion of policies concerning equality of chances on the labour market will be ensured based on European structural funds. (b) Policies favourable to women will be applied, in order to ensure proper conditions for adapting to immediate and future changes of the labour market. (c) Provision of subsidies to young graduates for 3 years and for women over 45 years old and those who support their families on their own. (d) Employed women who return from child-care leave can receive free qualification and re-qualification courses, financed by the budget of unemployment insurances.

- Social protection of women victims of domestic violence,
- Better quality social assistance for the elderly by adapting it to their needs: provision of home medical assistance, household support, decent accommodation, free of charge judicial consulting, for avoidance of any forms of fraud.
- Minority rights: decrease differences in income and living standards between the Roma and the rest of the population

### **FSN (PD) – PD**

1994: Social protection for the disadvantaged; means testing; the settlement of a minimum of subsistence as basis for welfare benefits (considered to be a liberal position by Zamfir 1999:610 as well as by Voicu M. 2005: 146)

1996 (as part of USD, together with the historical PSDR Romanian Social Democratic Party)

2000: 7.27% of the programme focuses on social policies (Ciobanu, 2006: 14)  
The social policies refer to: Education, Social cohesion, Social security, Social protection, Social support, Inclusion and partnership policies, Social insurance.

2005: Public services see also Voicu M.2005: 146

**2004: (PNL-PD)** Emphasis on equal and improved access to education, on policies for the Roma and for those with disabilities; proposals for mostly economic based policies for fighting discrimination and labour market

inequality, as well as for the promotion of social cohesion the facilitation of social and occupational integration of women, persons with disabilities, minorities, people with previous criminal convictions and refugees

### **Party family and salience of social inequalities**

It was noted and the overview of party manifestos also suggests that there are no major disagreements and few specific policies. In brief, in terms of welfare state all parties propose means testing as the main principle, just like all the other parties, free access to education but not to healthcare, except for the disabled; there is hardly any controversy over how to achieve gender equality, just agreement on the idea (most probably due to a desire to look European rather than sheer conviction) as well as minority policies (due to the interest of both alliances to be considered acceptable coalition partners by the Democratic Union of Hungarians in Romania).

Moreover, it is interesting to note that apart from the rather minor differences in content between parties, the salience of the various issues does not always follow the expected pattern, with the left-wing parties not necessarily assigning more space to main social inequalities issues.

### **The 'Flat' Tax**

However, the 2004 elections did see a main policy difference between the two main electoral alliances: the opportunity of a flat rate of income tax, which was actually introduced by the winning DA Alliance. Although the PSD government also suggested it as an option, their discourse against the flat rate was that it is bad for the poor because they will be taxed at a higher rate and there will be less money for social transfers. This was the first time after the (early 90s) discourse of Ion Iliescu in which the PSD tries to take a stance as protector of the many and directly as the party for the poor. This was a logical step given that their electorate tends to be poorer and in more low skilled jobs than that of the DA Alliance; yet it was most probably also an unsuccessful attempt to change the agenda, from corruption to poverty.

### **The latest**

There is an interesting recent development in party competition provided by the raise in opinion polls of the New Generation Party of the maverick Gheorghe (Gigi) Becali, millionaire, largely uneducated former shepherd, very religious man, owner of the one of the most popular football teams (Steaua Bucharest) and constant

source of entertainment. Support for his party is building on existing vote patterns based on anti-politics feelings and distrust of the existing politicians and political system which explained high support for the anti-system nationalist PRM in 2000 as noted by Pop-Eleches (2001) and probably currently explain support for president Basescu. Gigi Becali's appeal stands partly in his entertainment value, which renders him the second most present figure on television after the similarly jovial, populist and outspoken president Basescu.

Yet, this is a distinct phenomenon from the PRM and from Basescu, with relevance from a point of view of campaigning on social inequalities. Basescu's speech resonates to the masses in relation to his image of a strong 'anti-corruption leader' who wants to fight the 'bad political class.' Becali has a more direct and more populist appeal. Not only does he speak like an ordinary person, shares the conservative and religious views of the majority of the people, and he emphasizes them, but he is the first politician to openly make it his mission to address the needs of the disadvantaged, to respond to the concerns of a large part of the population, the chronically poor and marginalised.

Hans-Dieter Klingemann noted the fact that Becali can be credible in his claim, he speaks and looks like a conviction politician, which is what is largely lacking among the others. Moreover he is the first politician to make his promises look convincing by using his wealth to act on them: he paid for the construction of houses for those affected by flooding quicker than the government, paid the electricity bills of an entire neighbourhood disconnected from the system because of very high outstanding bills (Klingemann 2007a, b). Surely, these are populist acts and he is however more divisive than Basescu due to his even more excessive lack of manners and education. Yet, he raises for the first time, in a blunt and corrosive way the issue of poverty and inclusion, for an audience and in a manner sociological studies of the government of Adrian Nastase (see CASPIS) could not.

#### **4.2. Explanations for the stances and salience of social inequality in the national party systems**

The Romanian literature on welfare policies and poverty assumes that party competition is based on programmatic differences and that the stances of the political parties should match their left-right declared orientation in a loosely defined right-left policy space (Zamfir 2003, Voicu M. 2005, Voicu B. 2005.). By following this path

they generally fail to explain the low salience of a number of social inequalities issues in party programmes but they stress the higher occurrence of references to in social justice and the fight against poverty in the FDSN- PSDR -PSD programmes (Voicu M. 2003, Zamfir 1999). Moreover these analyses do not include in their explanatory models of support for welfare policies party attachment/ preference/choice but make only a linkage between the general agenda of the population and the party programmes (Voicu M. 2005: 143-150). Therefore, we do not know from this literature whether the divergent views on inequalities and welfare policies are systematically associated with partisan preferences and even less with evaluations of political parties.

The Romanian sociological literature also tries to provide as explanation of the low salience of inequalities and related policies in the nature of the transition. In their view a large part of the explanation lies in the general acceptance that economic recovery and growth are essential and they will lead to a generally higher living standard, the alleviation of poverty as well as to better social services, considered to be in crisis because of under-funding (Dan 1998, 2003, Marginean 2001).

One other interpretation is offered by Mihaela Miroiu who believes that political parties of the left and right, labelled 'conservative levellers' and 'minimalist conservatives', respectively, converge in being redistributive, seeing the state as the vehicle for the distribution of goods but rejecting active large scale social policies (Miroiu 1999). A less benevolent take on this interpretation is that Romanian political parties are not policy oriented because they think this is not necessary, all is necessary is to be able to provide pork to the clientele.

Our view is that political parties assign such low importance to issues of social inequalities and even less to actual policy proposals because of the non programmatic and catch-all nature of party competition (Popescu and Stefuriuc 2003, Soare 2003, 2007). Comparative theory orientated political science does indeed suggest that programmatic competition is likely to be limited in post-communist Romania (Kitschelt 1995, Kitschelt et al 1999). In our view, supported by recent research, this literature places an excessive emphasis on the relevance for party competition of differences in party electorates related to economic and political attitudes and even socio-demographic predictors of vote choice.

The fact that something predicts vote choice does not necessarily imply that this is a dimension of party competition (Bartolini and Mair 2001). Moreover, in Romania political parties do not look at attitudes in opinion polls and they do not propose policies with attitudes in mind but with what communication strategy to employ. The low salience of issues related to social inequalities, the apparent consensus on anti-poverty policies (see CASPIS and MCDIS and discussion in section V) and the lack of controversy and salience of policies in fields marred by inequality such as health and education outside the declarative level, suggests that even if there are social and attitudinal divisions that determine vote for a certain party, this does not entail to a cleavage mobilization of social inequalities or of programmatic differences in welfare, education or health policies in party competition (Greco 2005, Popescu and Stefuriuc 2003). The fact that the more educated and richer tend to vote for the right and the less educated and poorer for the PSD, does not necessarily mean that the policy proposals of the first stand for the educated middle class and those of the latter for the poor, not only because of the actual dearth of policy content but also because until now, partly due to the concurrent presidential elections, all parties had a catch all strategy (Soare 2007).

The question of why this dearth of policy content has been possible remains to be analysed. Clearly, citizens do not require it and the media do not think these are the key topics. Interestingly though, if for the most part of the post-communist period, there was no media and civil society interest in actual policy content, the 2004 elections registered the first evaluation of party programmes from a policy point of view, in the pages of the weekly *Dilema veche* (22 October 2004 supplement in collaboration with EuroActiv.com) as well as in some meetings organized by SAR (Romanian Academic Society) on specific policy areas (Hotel Continental, 2004). Although the importance of such a focus should not be underestimated since it can lead to a process of learning and change of focus in the media on the long run, they were not the central elements on civil society activity at election time such as the ‘Campaign for a clean parliament’ - an anti-corruption campaign focusing on profiling of candidates (Muntean and Gheorghita 2005, Popescu and Hatieganu 2007). Moreover, they did not have much of an impact on the short term and did not generate an equal interest in the media of larger circulation, especially television.

## SECTION 5. MECHANISMS FOR AMELIORATION OF SOCIAL INEQUALITY

Reduction of social inequalities is not an explicitly declared governmental goal but the increase of living standards and welfare of all citizens is. Moreover equality of chances, social and economic cohesion, reduction of poverty and social exclusion are part of the “fundamental goals” of the government (Governmental Programme 2004; Ch. 1, Governmental Commitments). The Tariceanu government aims to fulfil effective and equal access to citizens to basic medical care (Governmental Programme 2004: 36). It had established as priority the reconstruction of the educational system in rural areas (Governmental Programme 2004: 13); it also pledged “integral restitution of properties abusively confiscated by the Communist regime” as part of their equal treatment of property pledge (Governmental Programme 2004) and assures in an effective way the equal and enhanced access of all country’s citizens to education regardless their social, ethnic origin, religious believes, place of residence.<sup>25</sup>

### 5.1. Government policies

The government aims to tackle social inequalities first by limiting and eradicating corruption, second by economic and tax policies aimed to encourage employment and small and medium enterprises, third by specific policies in education, healthcare and social protection and fourth but not least all ensured through reforms of the welfare system, especially of the pension and healthcare systems.

**Tax System:** After the 2004 elections, the new Romanian Government introduced their electoral pledge to a flat rate of 16% in income tax. In 2005 it also reduced the quota of the profit tax from 25% to 16% since it was considered to also be a tax on the individual income.<sup>26</sup> The “Governmental Programme 2005-2008” adds a specific caveat that “the basic and supplementary reductions will be maintained so that low income persons should not be affected.”<sup>27</sup> According to the Government, “the gross average salary per economy will increase with nearly 60% within 2005-2008 in comparison with the actual level, and the minimum gross salary will follow at least

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<sup>25</sup> „Government Program 2005-2008. December 2004 Bucharest. pg 11; downloaded 15.02.2007 from <http://www.guv.ro/engleza/obiective/pg2005-2008/pg-guv-2005-2008-eng.pdf>”

<sup>26</sup> Art 5, Cap I, Title II of The Fiscal Code cited 17.02.2007, available from <http://www.softagency.ro/cf/cod/titlu2.html>

<sup>27</sup> „Government Program 2005-2008. December 2004. Bucharest. Pg 6. Cited 15.02.2007. available from <http://www.guv.ro/engleza/obiective/pg2005-2008/pg-guv-2005-2008-eng.pdf>”

the growth dynamics of the former.”<sup>28</sup> We mentioned above that the disparity between the average and minimum salary increased over time. The view of the government is that by the reduction of labour taxes there will also be an increase in collection of taxes (simpler and lower), an increase in employment and declared incomes (thought the diminution of the illegal labour and informal economy, noted in section II to represent significant phenomena, which generate inequality and maintain certain categories in disadvantaged situations even if they do limit extreme poverty. Tax reduction was seen by the government as generating more social equality also by giving a chance to those formally employed on the minimum wage to legalise their situation and have the same contractual and actual income and for those working on the black market to enter the labour force and thus have access to healthcare, pension and other welfare benefits.

**Economic policies.** Calin Popescu Tariceanu declared that “The business environment, the private sector, the free initiative, the liberal professions shall no longer be simple annexes to the Government. As a liberal, I shall equally reject both the influence of clientele groups pretending privileged, discriminatory positions on a market about to consolidate, and the exposure of private initiative, of small and medium size enterprises or foreign investors to the costs of a bad governance”<sup>29</sup>. A main action direction in this sense is the „reduction of the credits cost for small and medium sized enterprises by improving the legislative framework related to financial institutions adapted to the needs of small and medium entrepreneurs: credit cooperatives, popular banks, specialized institutions for financing the agricultural works and funds for guaranteeing the credit”<sup>30</sup>

**Welfare benefits.** According to Chapter 7 of the Governmental Programme, the Government will develop measures in order to:

- Decrease poverty and social exclusion;
- Improve the living standard for the aged persons;
- Ensure access to the system of social insurance according to the level of the contributions to system;

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<sup>28</sup> „Government Program 2005-2008. December 2004. Bucharest. pg 28. cited 15.02.2007. available from <http://www.guv.ro/engleza/obiective/pg2005-2008/pg-guv-2005-2008-eng.pdf>

<sup>29</sup> Idem 5

<sup>30</sup> „Government Program 2005-2008, December 2004. Bucharest. pg 9; cited 15.02.2007. available from <http://www.guv.ro/engleza/obiective/pg2005-2008/pg-guv-2005-2008-eng.pdf>”

- Progressively decrease the number of assisted persons and encourage them to identify alternative sources of social security;
- Ensure conditions for the equality of chances and social participation of handicapped persons and of the disadvantaged.

### **Examples of such measures are**

#### ***1. the improvement of the living standards of aged people through:***

- Elimination of inequities from the public system of pensions;
- acceleration of the process of recalculation of all pensions;
- protection of the purchasing power of pensions;
- increase of pensions; increase of the purchasing power of the pensioners from the agricultural field;
- increasing the revenues of the social insurance budget;
- introduction of the schemes of facultative pensions managed by the private sector and introduction of the compulsory funds of pensions managed by private sector, in the conditions of a public transparent and efficient control upon their management<sup>31</sup>;
- construction of new boarding houses as well as modernization of the existing ones to create decent living conditions to aged persons
- achievement of some social medical integrated services at home;
- special programs for preventing the situation of dependency and increase the involvement of aged persons within social life<sup>32</sup>;

#### ***2. social assistance through:***

- the minimum guaranteed income, that addresses the poorest social segment, which will be granted so that they can overpass their actual poverty level, without discouraging work;
- increase of child benefits up to nearly 10 euro<sup>33</sup>;
- granting land area for free use to poor families from rural areas<sup>34</sup>;
- stimulation of construction of social dwellings for disadvantaged citizens<sup>35</sup>;

<sup>31</sup> These measures are explicated in „Government Program 2005-2008, December 2004 Bucharest. pg 22-25; cited 15.02.2007. available from <http://www.guv.ro/engleza/obiective/pg2005-2008/pg-guv-2005-2008-eng.pdf>”

<sup>32</sup> „Government Program 2005-2008, December 2004 Bucharest. pg 34; cited 15.02.2007. available from <http://www.guv.ro/engleza/obiective/pg2005-2008/pg-guv-2005-2008-eng.pdf>”

<sup>33</sup> From „The Program of measures to increase the family income and the quality of family life”. „Government Program 2005-2008, December 2004 Bucharest. pg 29; cited 15.02.2007. available from <http://www.guv.ro/engleza/obiective/pg2005-2008/pg-guv-2005-2008-eng.pdf>”

<sup>34</sup> Idem 10

- elaboration of a set of active measures for the integration of unemployed family upholders into the labour market<sup>36</sup>;
- building dwellings in the system of mortgage loans<sup>37</sup>;
- granting financial aid amounting to 200 Euro for new families, at the first marriage of each of the spouse<sup>38</sup>;
- granting land in the limit of its availability to poor Roma families for their direct and their free use<sup>39</sup>;
- re-launching the trades specific to Roma population; reintegration through work/participation through work to the development of local communities<sup>40</sup>;
- developing the incubators of small entrepreneurs for Roma population<sup>41</sup>;
- granting a monthly allowance for child raise up to the age of 2(3) years<sup>42</sup>;
- social integration of children who are facing perception problems within the educational process(children with disabilities), as well as of children infected with HIV/AIDS;
- supporting to institutionalized youth aged over 18 years to integrate into social life<sup>43</sup>;
- special protection and employment of disabled persons;

Reorganizations of hospitals and of access to subsidized medicines have been the topics most covered in the media regarding the government's policies.

### **Labour market policies:**

The current (post-2004) government have been stressing the importance of a free labour market dominated by impartiality and judicial symmetry between employee and employer. The Government prioritizes the elimination of the provisions

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<sup>35</sup> Idem 10

<sup>36</sup> Idem 10

<sup>37</sup> From "The Program of supporting the young family". „Government Program 2005-2008, December 2004 Bucharest. pg 30; cited 15.02.2007. available from <http://www.guv.ro/engleza/obiective/pg2005-2008/pg-guv-2005-2008-eng.pdf>"

<sup>38</sup> Idem 14

<sup>39</sup> From "The program of integration of Roma families in community" „Government Program 2005-2008, December 2004 Bucharest. pg 30; cited 15.02.2007. available from <http://www.guv.ro/engleza/obiective/pg2005-2008/pg-guv-2005-2008-eng.pdf>"

<sup>40</sup> Idem 16

<sup>41</sup> Idem 16

<sup>42</sup> As a measure to decrease child abandonment and the increase of birth rate; „Government Program 2005-2008, December 2004 Bucharest. pg 31; cited 15.02.2007. available from <http://www.guv.ro/engleza/obiective/pg2005-2008/pg-guv-2005-2008-eng.pdf>"

<sup>43</sup> „Government Program 2005-2008, December 2004 Bucharest. pg 33; cited 15.02.2007. available from <http://www.guv.ro/engleza/obiective/pg2005-2008/pg-guv-2005-2008-eng.pdf>"

of the Labour Code that restrain the right of the managers to take decisions upon the companies that they are running for the purpose of increasing work productivity and economic and financial efficiency, in general and the reintroduction of civil conventions as juridical instrument to establish labour relations (Governmental Programme 2004: 10).

In order to achieve the decrease in unemployment, the cabinet established after the 2004 elections, announced promotion of various types of measures, like offering consultancy in professional training and retraining, decreasing the unemployment benefits in order to cut incentives for unemployment, creation of a national agency for employment, whose main role is to mediate between employers and labour market<sup>44</sup>

### **5.1.B. Trends in tax revenue and welfare spending since the collapse of Communist power**

In spite of the presence of a party considered a communist successor, Romania has a smaller welfare state than its more ‘liberal’ neighbours such as Hungary. One explanation for that is the fact that the pre-1989/ communist welfare state was also more limited in Romania than in other EE countries (CASPIIS 2001, Ch. 15, Methodological Note, Marginean 2001).

**TABLE 5.1. Public spending (% GDP)**

	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001
<b>Romania</b>	14,2	16,6	17	16,5	15,2	15,5	16	15,7	15,9	17,3	18,4	17,2	18,2
<b>E. U. countries</b>	25,4	25,5	26,5	27,7	28,8	28,4	28,3	28,5	28	27,6	27,6	-	-
<b>Bulgaria</b>	20,3	21,2	24,5	27	22,8	21	18,3	16,3	17	19	21,2	-	-
<b>Hungary</b>	22,5	22,7	29,6	31,9	31,3	32,3	-	-	23,8	24,4	23,5	-	-
<b>Czech Republic</b>	21,5	23	24,2	22,9	25,9	25,5	23,3	23,1	25	24,8	-	-	-

Source: Marginean 2001 based on National Human Development Report, Romania (2000); Abramovici, G., Social Protection in Europe, Statistics in focus, EUROSTAT, (nr. 1/2002); Ministerul de Finanțe

<sup>44</sup> „Government Program 2005-2008, December 2004. Bucharest. pg 25-26; cited 15.02.2007. available

**TABLE 5. 2. Direct social transfers as percentage of GDP**

	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001
<b>Social transfers</b>	9,5	10,7	10,1	9,6	9,3	9,3	9,7	9,3	10	10,9	11,3	10,2	10,2

Sursa: Marginean 2001, based on Raportul Național al Dezvoltării Umane, România, 2000

\*pensii, ajutor de șomaj, alocații pentru copii, ajutor social

## 5.2. Alternative non-governmental mechanisms for amelioration of social inequality

### Trade unions, Churches and NGOs

Romanian trade unions developed steadily after 1989, becoming one of the most visible organizations of civil society. They did not only get involved in violent interaction with state institutions, like in the case of miners' marches on Bucharest in 1990, 1991 and 1999, but also presented themselves as champions of fighting against labour market inequalities. In reality, trade unions do not have a measurable impact on fighting inequalities. Two mechanisms of unions' involvement can be identified: the first one, remnant from the communist period, is formed by individual services and benefits trade unions offer to their members. Union members have access to spas and recreation facilities at discounted prices, which would be less accessible for them in the absence of unions' services. Unions provide their members with consultancy for labour market related problems. These services might not be identified as specific and targeted for fighting inequalities; rather they are intended to provide individual incentives for membership, as part of the unions' strategy to increase or at least maintain the level of membership.

The second mechanism refers to unions' participation in collective bargaining with the state and employers; and participation in official institutions like the Economic and Social Council (ESC), designed to offer employers and trade unions the framework for presenting their position on economic and social related bills. Every bill with impact on economy has to receive the consultative agreement of ESC in order to become a law. (Muntean 2003)

Compared with trade unions, the churches in Romania are more actively involved in fighting social inequality. For example, the Romanian Orthodox Archbishopric has a special department for social projects, whose members are

priests, social assistants and one specialist doctor. This Department cooperates in projects of social assistance, support for projects of towns' churches and financial and logistic implication for these projects with state's institutions and NGOs<sup>45</sup>. A Romanian Orthodox Church's involvement in reducing the social inequality has been the church-service for deaf-mute persons. Some orthodox priests of Iasi, Oradea, Pitesti, Constanta and Bucharest preach using "mutually speech", so impaired persons can also confess in church. An example of this kind of preaching is the priest of Radu Voda Church from Bucharest<sup>46</sup>.

The churches collect funds from the believers but they also engage partnerships with organizations, governmental agencies and mass media to develop social programs. For example, during 2006, the Romanian Orthodox Church spent 7 million new lei<sup>47</sup> (about 12 million euro) on social-philanthropic events, and The Romanian Catholic Church invested 270.513 lei (90,000 euro) only at level of Archdiocese of Cluj<sup>48</sup>.

They build up a network of social houses for individuals in need and of social consultancy centres. Nowadays Romanian Orthodox Church manages about 279 social houses: 91 for children in need; 32 for old people; 92 social canteen and bakeries; 37 surgeries and chemist's shops; 7 diagnosis and medical attendance centres; 7 consultant centres; 9 centres for assistance for families with problems; 1 assistance centre for the victims of human trafficking<sup>49</sup>. The Romanian Catholic Church, developed special projects of nursing service, housekeeping and social assistance service for the ill persons and their families, managed by Caritas since 1994. During 2003 for example, 8.286 patients benefited of these services offered by Caritas. The Reformed Unitarian Church in Transylvania administers an ecumenical nursing home for aged people with 24 beds in Locoteni, Harghita.

During the last years churches are concentrated on developing a more formal and organized method of social involvement in communities, through the church-

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<sup>45</sup> [http://www.crestinism-ortodox.ro/html/stiri/16-19\\_mai\\_2001.html](http://www.crestinism-ortodox.ro/html/stiri/16-19_mai_2001.html)

<sup>46</sup> [http://www.crestinism-ortodox.ro/html/stiri/17\\_iunie\\_2004.html](http://www.crestinism-ortodox.ro/html/stiri/17_iunie_2004.html)

<sup>47</sup> "The social- philanthropic work of the Romanian Orthodox Church analyzed from The National Church Council" available from <http://www.patriarhia.ro/Stiri/2007/010.html>

<sup>48</sup> Bilanțul Arhiepiscopiei Clujului în anul 2006 (comunicat) (The 2006 progress report of The Romanian Catholic Archdiocese of Cluj), 28.02.2007, Cluj, available from <http://www.catholica.ro/stiri/show.asp?id=13338&lang=>

<sup>49</sup> "The social- philanthropic work of the Romanian Orthodox Church analyzed from The National Church Council" available from <http://www.patriarhia.ro/Stiri/2007/010.html>

based NGOs – non-governmental organizations that are founded by churches or have strong financial and organizational connections with churches – (Muntean 2006). These NGOs take upon themselves a great deal of the social issues of the Romanian society, sometimes more effectively than the state or the public system does.

An interesting project to tackle with a form of social inequality (mainly children in need) is represented by the Stavropoleos-Concordia Project, currently renamed Saint Dimitrie Foundation Project. This project represents an example of effective inter-denominational cooperation in Romania. It is an important project, developed in 1998. The Social Centre for children “St Dimitrie”, founded and administered by the Orthodox Foundation Stavropoleos and the Catholic Foundation Concordia offers assistance to the institutionalized youngsters- “the children of the streets” – mainly social integration while offering them a house during the day, meals, medical service for emergencies, psycho pedagogical and religious assistance and education. The Concordia Organization signed an agreement with “Back to School” Foundation to restore the teenagers to the education system<sup>50</sup>.

The Romanian Orthodox Church was involved in campaigns against HIV-positive individual’s discrimination through the project “Consolidation of the Community Initiatives of preventing HIV and family violence in Romania” informing and teaching interested priests in a special seminar organized in October 2006<sup>51</sup>.

The Romanian Orthodox Church’s involvement in the issues of social inequalities is rather based on individual projects than on a national coordinated campaign. Several examples of these punctual projects are: “St. Filofteia Day-centre for Roma children” in Alba County; “Filantropia Christian surgery” in Mures County, “Wings of light - Centre for children” in Craiova; “St Nicholas Day-centre” in Mehedinti County, “St Fanurie Day-centre” in Bucharest<sup>52</sup>.

One of the most important church-based NGO is Caritas Romania Confederation, a subsidiary of Caritas Internationalis and Caritas Europe, under the patronage of The Catholic Church. Being one of the largest NGO in Romania (in terms of employees, volunteers and programs) it carries on national programs for home care, for disabled people and for migrants. It also gives aid to elderly and poor

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<sup>50</sup> The Stavropoleos-Concordia Project, currently renamed Saint Dimitrie Foundation Project available from [http://stavropoleos.starnets.ro/centru\\_1.html](http://stavropoleos.starnets.ro/centru_1.html) Last accessed March 07, 2007

<sup>51</sup> Statement to the press at 6 February 2007, “Also the teachers of religion are implicated in HIV prevention”, available from [http://www.m-ol.ro/index.php?option=com\\_content&task=view&id=1698&Itemid=9](http://www.m-ol.ro/index.php?option=com_content&task=view&id=1698&Itemid=9)

<sup>52</sup> “Social assistance of Romanian Orthodox Church at 2004”

people. “Caritas Romania Confederation was set up because of the necessity of having a representation on the national and international level, in order to present and defend the social-charity interests of all Diocesan Caritas in Romania. The most important national programmes of Caritas Romania Confederation are the following: The “Home Care Services” National Programme<sup>53</sup>; the “Migrants” National Programme<sup>54</sup>; the “Anti-Drug” National Programme<sup>55</sup> and the "Assistance and Counselling Office for Disabled Persons" National Programme (B.A.C.H.)<sup>56</sup>. In the “Migrants” program the church is cooperating with the Ministry of Labour, Family and Social Affairs - The Office for Workforce Migration in order to offer “guidance of the potential emigrants in looking for a legal job; provision of information on the emigrants' rights and obligations in the destination country; provision of information for the potential emigrants on the social assistance system they will be dealing with; provision of information on the consequences of emigration on family cohesion; prevention from becoming a victim of human trafficking or workforce trafficking; lobby towards the governmental authorities for signing an agreement with the Italian state in order to send workers with legal forms in Italy”<sup>57</sup>.

The last two programmes of the Catholic Church are designed for drug-addicted persons and disabled persons affected by discrimination. If the first programme concerns information about drug dependence and prevention field in Romania, the latter is more practical and has consists of a national network made up of 11 counselling offices across Romania. This latter programme has 5077 assisted persons per years and some of their provided services are : provision of assistance in order to obtain prosthesis, and various medical appliances, therapeutically services; information concerning the social assistance services for disabled persons; the creation and maintenance of a database with the services provided for disabled people; specialized counselling for disabled and his or her family; organization and guidance of the self-help and support groups; organization of trainings; promotion of disabled people's interests towards various authorities; organization of manifestations, actions and activities with and for the disabled persons and their families having for

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<sup>53</sup> Available from <http://www.caritas.org.ro/english/domiciliu.html>

<sup>54</sup> Available from <http://www.caritas.org.ro/english/migranti.html>

<sup>55</sup> Available from <http://www.caritas.org.ro/english/antidrog.html>

<sup>56</sup> Available from <http://www.caritas.org.ro/english/bach.html>

<sup>57</sup> Available from <http://www.caritas.org.ro/english/migranti.html>

purpose not only recreation, but also the enlargement of the social network<sup>58</sup>. The other denominations in Romania are actively involved in activities like administering orphanages, social houses for poor, centres for social assistance.

According to the National NGOs Catalogue delivered by FDSC (Foundation for the Development of Civil Society – [www.fdsc.ro](http://www.fdsc.ro)), there are currently 734 NGOs registered in Romania, that have as main fields of activity general human rights, more specific the protection and promotion of individual rights, of civil rights, of minorities' rights, and also to offer social assistance and juridical guidance, as well as rehabilitation and reintegration of persons in the society, for supporting the victims of different types of abuses. There are also 287 foundations, associations and organizations for promoting volunteering. Regarding the health field, there are registered at national tier, 913 NGOs that offer social assistance and services to different categories of invalids. Different social services for children, youth, old people, physically impaired persons, families, refugees or poor people are offered by 1524 organizations<sup>59</sup>.

Several NGOs are very active and reflected in media, while militating for the decrease of inequality between Romanians. Gender inequalities such as the gender discrimination, is a field of interest for many NGOs. *The Association of Women from Romania* ([www.afr.ro](http://www.afr.ro)) was founded right after the revolution, namely in 1990. Its main purposes are to increase the civic spirit among the Romanian women and to help the women to obtain the economic independency. Its latest programs include working with disadvantages families, helping them financially, and also psychologically assisting them.

The sexual minorities in Romania are represented mainly through the association ACCEPT ([www.accept.ro](http://www.accept.ro)), whose activities are taking greater proportion daily, catching the public attention in mass media or in public parades. Its main goal is to reduce the social inequalities of the gender minorities.

One of the most active organizations that fight against the age inequality is *The Foundation of Aid and Development Sperante* (<http://sperante.org.ro/infor.htm>), founded in 1995. It offers to the aged people high standard services of social assistance.

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<sup>58</sup> Available from <http://www.caritas.org.ro/english/bach.html>

<sup>59</sup> Foundation for the Development of Civil Society (2000). The National NGOs Catalogue.

As concerns national minorities, several NGOs are very active in Romania. *The Foundation Resource Centre for The Roma Communities* ([www.romacenter.ro](http://www.romacenter.ro)), was established in 1999 by The Open Society Foundation. It has the mission to contribute to the improvement of the life conditions of the Roma communities across Romania. One of the most recent programs consists of training Roma people for becoming agents of rural interethnic communities. *The Association of the Roma Women in Romania* ([www.romawomen.ro](http://www.romawomen.ro)) has the purpose of improving the chance of the Roma women to obtain jobs and to ensure the equality of the education chance among the Romany. Another active NGO that militates in this field is *Romani CRISS - Roma Centre for Social Intervention and Studies* ([www.romanicriss.org](http://www.romanicriss.org)), which defends and promotes the rights of Roma people in Romania. It provides legal assistance in cases of abuse and campaigns to combat and prevent racial discrimination against Roma people in all areas of public life, including the fields of education, employment, housing, and health.

Other important nongovernmental organizations that activate for the decrease of social inequalities are: *The Estuar Foundation*, having the mission of social integrating the mentally ill adults ([www.estuar.org](http://www.estuar.org)); *Red Cross Romania* ([www.crucearosie.ro](http://www.crucearosie.ro)), with the objective of helping the impoverished people after the natural disasters; *Chance for Life* ([www.chanceforlife.org](http://www.chanceforlife.org)), having the purpose of educationally, socially and psychologically sustaining the children and the youth that face the risk of social exclusion; *Save the Children* ([www.salvaticopiii.ro](http://www.salvaticopiii.ro)), fights for the children's rights.

Health inequalities also represent an interest subject for NGOs that take a burden off the state's shoulders. These NGOs take upon themselves the task of carrying over the terminally ill patients. Such NGOs like *Hospice Casa Sperantei Brasov* ([www.hospice.ro](http://www.hospice.ro)) promote palliative care and the hospice philosophy on a national level throughout their private hospital in Brasov and the Study and Resource Centre for Palliative Medicine and the mobile medical teams in Bucharest. *St Irina* (<http://www.paliativecare.ro>) and *Mobilmed* (<http://www.mobilmed.ro>) foundation are NGOs active in palliative care field in Bucharest. All these organizations have opened paths in palliative care well before the state and the public health system have expressed any interest in this issue. The services these NGOs offer to individuals are currently not offered by the public health system.

## **Family**

Last but not least, just like NGOs with specific fields of activity replace what has usually been the state in most West European countries, the family also takes a lot of the burden of welfare needs. The situation is similar to that in other southern European countries, such as Italy or Greece, where care for the elderly falls on the family, just like care for children often falls on grandparents and the extended family (Voicu M. 2005: 40, 42). Given the limited places in state kindergartens and nurseries as well as the short school programme, with no activities meant to keep children in school until parents return from work, the role of grandparents is crucial, and in their absence children become self sufficient (for going home, having lunch, etc) from a very early age. Children leaving school unaccompanied even aged 7-10, which seems an unimaginable and even illegal behaviour in much of the Western world and even in much of Eastern Europe is a common situation in Romania. This is due to the typical schedule of primary schools, from 8 to 12 or 9 to 13, without lunch and with very few places in afternoon care structures. Regarding the elderly, if in countries like Italy income of a larger part of the population allows for hiring (more or less qualified) help, this is prohibitively expensive for the majority of the population. Care for the elderly, including for those suffering from old-age dementia, Alzheimer or mobility impairments falls on the family, with both material and psychological costs hard to evaluate and not part of any political discussion.

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### **Acronyms**

ICCV – Institute for the Research on the Quality of Life

INS – National Statistics Institute

CASPIS – Committee on Anti-Poverty and Promotion of Social Inclusion

### **Political Parties and Institutions**

CDR - Romanian Democratic Convention (*Convenția Democrată Română*) – included as main members PNL and PNTCD (see below)

FDSN - Democratic Front of National Salvation (*Frontul Democrat al Salvării Naționale*), renamed PDSR in July 1993.

FIDESZ - Federation of Young Democrats (*Fiatal Demokraták Szövetsége*)

Fidesz-MPP [ex-FIDESZ] - Fidesz–Hungarian Civic Party (*Fidesz – Magyar Polgári Párt*)

FSN - National Salvation Front (*Frontul Salvării Naționale*), split in 1991 into FSN (leader Petre Roman) later FSN(PD), then just PD (see below) and FDSN (leader Ion Iliescu)

PD - Democratic Party (formerly FSN, FSN-PD) (*Partidul Democrat*)

PDSR - Party of Social Democracy of Romania (*Partidul Democratiei Sociale din Romania*), formerly FDSN, since 2001 PSD.

PNG – New Generation Party (*Partidul Noua Generație*) – leader Gigi Becali

PNL - National Liberal Party (*Partidul Național Liberal*)

PNȚCD - National Peasant Party - Christian Democrat (*Partidul Național Țărănesc - Creștin Democrat*)

PRM – Greater Romania Party – (*Partidul România Mare*)

PSD - Social Democratic Party (*Partidul Social Democrat*), formerly PDSR.

PUNR - Party of Romanian National Unity (*Partidul Unității Naționale Române*)

UDMR - Democratic Union of Hungarians in Romania (*Uniunea Democrată Maghiară din România*)

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### **Definitions and measurement**

Extreme poverty = Population living on less than US\$1 (at the purchase power parity rate), which affects around 1% of the population; Source: Romania, United Nations Common Country Assessment, 2003

Severe poverty = Large and persistent poverty that prevents people to function normally in society, which affects around 12% of the population; Source: Romania, United Nations Common Country Assessment, 2003

Poverty = A shortage of resources as compared to the requirements for a decent minimum living standard, which affects 17% of the population Source: Romania, United Nations Common Country Assessment, 2003

Purchasing power parity gross national income (PPP GNI): This measure is GNI converted to international dollars using purchasing power parity. An international dollar has the same purchasing power over GNI as a U.S. dollar has in the United States. The World Bank favours this measure for accurate measurement of poverty and well-being; in effect, it substitutes global prices for local measured prices, thereby more accurately reflecting the real value of the good or service in question. This is especially true of non-tradable services (haircuts are the example) which are assumed to produce the same level of welfare from one country to another, but which vary widely in their measured local price. See

<http://web.worldbank.org/WBSITE/EXTERNAL/DATASTATISTICS/0,,contentMDK:20399244~menuPK:1504474~pagePK:64133150~piPK:64133175~theSitePK:239419,00.html>

Household final consumption expenditure (formerly private consumption) is the market value of all goods and services, including durable products (such as cars, washing machines, and home computers), purchased by households. It excludes purchases of dwellings but includes imputed rent for owner-occupied dwellings. It also includes payments and fees to governments to obtain permits and licenses. Here, household consumption expenditure includes the expenditures of nonprofit institutions serving households, even when reported separately by the country. This

item may also include any statistical discrepancy in the use of resources relative to the supply of resources. See

<http://web.worldbank.org/WBSITE/EXTERNAL/DATASTATISTICS/0,,contentMDK:20451590~pagePK:64133150~piPK:64133175~theSitePK:239419,00.html>

## Appendix

**Table 1.1.a: GDP, Post-communism 1990 -2004**

<i>Index</i>	<i>1990-1999</i>	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
GDP Growth (annual%)		-5.60	-12.90	-8.84	1.51	3.97	7.16	4.01	-6.10	-4.79	-1.20
GDP per capita (constant 2000 US\$)		1895.53	1652.57	1532.66	1558.15	1621.72	1741.66	1817.33	1710.51	1632.29	1615.93
GDP per capita growth (annual %)		-5.82	-12.82	-7.26	1.66	4.08	7.40	4.34	-5.88	-4.57	-1.00
GDP per capita, PPP (constant 2000 international \$)		6681.93	5847.64	5443.05	5544.99	5766.30	6210.15	6488.10	6111.47	5839.08	5787.61
GDP per capita, PPP (current international \$)		5452.75	4938.76	4702.92	4901.07	5204.17	5719.04	6088.76	5831.11	5633.12	5664.14
GDP per unit of energy use (constant 2000 PPP \$ per kg of oil equivalent)		2.48	2.63	2.62	2.77	3.05	3.03	3.09	3.08	3.23	3.59

<i>Index</i>	<i>2000-2004</i>	2000	2001	2002	2003	2004
GDP Growth (annual%)		2.10	5.70	5.10	5.20	8.40
GDP per capita (constant 2000 US\$)		1650.97	1769.59	1887.90	1991.65	2164.64
GDP per capita growth (annual %)		2.17	7.19	6.69	5.50	8.69
GDP per capita, PPP (constant 2000 international \$)		5887.41	6308.15	6750.38	7214.20	7995.64
GDP per capita, PPP (current international \$)		5887.41	6460.10	7027.38	7648.10	8699.81
GDP per unit of energy use (constant 2000 PPP \$ per kg of oil equivalent)		3.64	3.75	3.92	4.02	

*Source: World Bank, WDI*

**Table 1.1.b: GDP, 1980s**

<i>Index</i>	<i>Year</i>	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989
<b>GDP Growth (annual%)</b>	***	0.77	4.00	6.10	5.90	-0.10	2.40	0.80	-0.50	-5.80	
<b>GDP per capita (constant 2000 US\$)</b>	1844.30	1845.78	1908.95	2018.66	2130.96	2119.47	2161.04	2167.23	2145.75	2012.75	
<b>GDP per capita growth (annual %)</b>	***	0.08	3.42	5.75	5.56	-0.54	1.96	0.29	-0.99	-6.20	

*Source: World Bank,  
WDI*

**Table 1.2.a: GNI, 1980s**

<b>Index</b>	<b>1980-1989</b>	<b>1980</b>	<b>1981</b>	<b>1982</b>	<b>1983</b>	<b>1984</b>	<b>1985</b>	<b>1986</b>	<b>1987</b>	<b>1988</b>	<b>1989</b>
<b>GNI (current LCU) – 1.000 billions</b>		~not available for this period~									
<b>GNI (current US\$) – billions</b>		~not available for this period~									
<b>GNI per capita, Atlas method (current US\$)</b>		~not available for this period~									
<b>GNI per capita, PPP (current international \$)</b>		3530	3860	4230	4660	5100	5230	5450	5610	5750	5600
<b>GNI, Atlas method (current US\$) - billions</b>		~not available for this period~									
<b>GNI, PPP (current international \$) - billions</b>		78.4	86.3	95.1	105	115	119	124	129	133	130
<b>GINI index</b>		~not available for this period~									

**Table 1.2.b: GNI, Post-communism 1990 -2004**

<b>Index</b>	<b>1980-1989</b>	<b>1990</b>	<b>1991</b>	<b>1992</b>	<b>1993</b>	<b>1994</b>	<b>1995</b>	<b>1996</b>	<b>1997</b>	<b>1998</b>	<b>1999</b>	<b>2000</b>	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	
<b>GNI (current LCU) – 1.000 billions</b>		0.86	2.2	6.01	19.9	49.6	71.6	108	251	370	539	798	1160	1500	1930	2360	
<b>GNI (current US\$) – billions</b>		38.5	28.9	25	26.2	29.9	35.2	35	35	41.7	35.2	36.8	39.9	45.4	58.2	72.3	
<b>GNI per capita, Atlas method (current US\$)</b>		1730	1430	1240	1190	1270	1470	1600	1520	1520	1580	1700	1750	1930	2290	2950	
<b>GNI per capita, PPP (current international \$)</b>		5480	4940	4690	4880	5180	5680	6040	5780	5570	5600	5840	6420	6960	7470	8340	
<b>GNI, Atlas method (current US\$) - billions</b>		40	33.2	28.3	27.1	28.9	33.4	36.1	34.4	34.1	35.4	38	38.8	42	49.8	64	
<b>GNI, PPP (current international \$) - billions</b>		127	115	107	111	118	129	137	130	125	126	131	142	152	162	181	
<b>GINI index</b>		~not available for this period~					31.6	30.8	29.6	29.3	28.6	28.6	28	28.8	28.1		

**Table 1.5.a. Education**

*Source: The 2003-2005 National Human Development Report (NHDR), UNDP*

	1996	1997	1998	1999	2000	2001	2002	2003
<b>Gross enrolment rate (%) in:</b>								
<b>primary education</b>	100.3	97.5	99.8	100.1	100.3	104	103.7	109.1
<b>lower secondary education</b>	87.9	92.3	94.3	93.9	94.7	92.1	93.7	93.5
<b>upper secondary education)</b>	69.1	68.6	67.8	69.4	71.7	75.1	75	74.7
<b>tertiary education</b>	22.2	22.7	25.4	28	31.9	35.1	38.9	41.2
<b>Gross enrolment rate (%) in pre-primary education (%)</b>	60.4	62.8	64.2	65.2	66.1	67.5	71	71.8
<b>Rate of continuation into upper secondary education (%)</b>	93.5	95.4	95.9	92.5	95.1	95.6	93.1	97.9
<b>Number of pupils and students per:</b>								
<b>100 persons aged 6-23 years</b>	62	62.9	63.9	64.9	66.5	68.3	70.2	71.6
<b>1000 inhabitants</b>	178.1	178.2	178	176.4	176.3	175.8	177.4	176.5
<b>Number of pupils/students per teacher/professor in:</b>								
<b>primary education</b>	15	15	15	15	15	15	15	16
<b>lower secondary education</b>	20	19	19	19	18	17	17	17
<b>upper secondary education</b>	11	12	12	13	13	12	12	12
<b>tertiary education</b>	15	14	13	13	13	14	15	16
<b>tertiary education</b>	16	16	17	19	21	22	21	21
<b>Students in secondary technical education as share of total enrolment in upper secondary education (%)</b>	68.3	67.8	67.4	62.6	63.9	64.1	64.4	64.8
<b>Students in technical universities as share of total number of students in the total number of students (%)</b>	27	27.4	27.6	27.7	26	25.7	25.6	25.4
<b>Students in private universities as share of total number of students (%)</b>	26.4	30.7	31.9	28.8	28.3	25.2	23.3	23.2
<b>Pupils registered in special education for children with disabilities:</b>								
<b>total</b>	52503	52433	52430	50785	48145	43362	39620	36208
<b>primary and secondary education</b>	36704	36953	37423	36729	34805	30497	27165	23533
<b>Proportion of pupils enrolled in education units with teaching language other than Romanian (primary and secondary education) (%):</b>								
<b>out of which: Hungarian language</b>	4.8	4.9	4.8	4.9	4.9	4.9	5	5
	4.3	4.4	4.3	4.4	4.4	4.4	4.4	4.5
<b>Public expenditure on education % of GDP</b>	3.6	3.3	3.3	3.2	3.1	3.2	3.1	3
<b>Proportion of expenditures for tertiary schools in the total public expenditures for education (%)</b>	17.8	15.9	19	16.7	10.8	10.2	10.3	11

**Table 1.6 – Health characteristics**

<i>Source: The 2003-2005 National Human Development Report (NHDR), UNDP</i>														
	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003
<b>Mortality rate (per 100.000 inhabitants) by cause:</b>														
<b>circulatory diseases</b>	627	658.2	707.7	712.3	709.9	736.1	786	761.5	738.6	737	*	*	*	*
<b>tumors</b>	142.1	144.7	153	158.9	162.2	165.5	170.3	173.6	174.6	*	*	*	*	
<b>respiratory diseases</b>	97.3	91.3	94	79.7	80.6	75.8	86.2	77.6	70.8	74	*	*	*	*
<b>Infantility mortality rate (per 1000 live births)</b>	26.9	22.7	23.3	23.3	23.9	21.2	22.3	22	20.5	18.6	*	*	*	*
<b>Maternal mortality rate (per 1000 new born)</b>	83.6	66.5	60.3	53.2	60.4	47.8	41.1	41.4	40.5	41.8	*	*	*	*
<b>Percentage of persons aged 5 and above who stand no chance to live to the age of 60</b>	18	18.1	18.3	19.1	19.7	20.2	20.9	21.1	20.9	18.8	*	*	*	*
<b>Total abortion rate</b>	*	*	*	*	*	*	2.73	2.08	1.61	1.52	1.51	1.47	1.5	1.36
<b>Number of abortions per one live birth</b>	*	*	*	*	*	*	1.97	1.47	1.14	1.11	1.1	1.15	1.17	1.06
<b>Annual average consumption) of alcohol (liters per capita)</b>	7.6	8	9	8.6	8.7	9	8.9	9.3	8.1	*	*	*	*	*

## Appendix.

Sources (as listed in Voicu B. 2005: 18-21).

- a) Dan, 1998;
- b) Federal Statistical Office Germany 2002, <http://www.destatis.de/basis/e/bauwo/bauwotab1.htm> ;
- c) *Danish Statistical Yearbook, 2003* (<http://www.dst.dk/pukora/epub/upload/3985/construk.pdf>);
- d) Statistics Norway ([http://www.ssb.no/english/subjects/10/12/20/bilreg\\_en/main.html](http://www.ssb.no/english/subjects/10/12/20/bilreg_en/main.html));
- e) Dan și Dan, 2003;
- f) National Statistic Service of the Republic of Armenia, <http://www.armstat.am/StatData>;
- g) [http://europa.eu.int/comm/energy\\_transport/etif/transport\\_means\\_road/oec\\_cars.html](http://europa.eu.int/comm/energy_transport/etif/transport_means_road/oec_cars.html)
- h) Swiss Statistics ([www.statistik.admin.ch/stat\\_int/eint\\_m.htm](http://www.statistik.admin.ch/stat_int/eint_m.htm));
- i) National Statistical Service of Greece - *Greece in figures 2003*;
- j) Institut National de Statistique, Belgique, [http://www.statbel.fgov.be/home\\_fr.htm](http://www.statbel.fgov.be/home_fr.htm);
- k) Statistik Austria ([http://www.statistik.at/englisch/results/raum/kfz\\_txt.shtml](http://www.statistik.at/englisch/results/raum/kfz_txt.shtml))
- l) CANSTAT 2003, <http://www.std.lt/web/uploads/Canstat/>
- m) FiFo-Ost, <http://www.fifoost.org/index.php>
- n) Republic of Croatia, Central Bureau of Statistics - *Statistical Information 2003*, Zagreb, 2003;
- o) UK Comission for Integrated Transport - *European Best Practice in Transport - the German Example*, 2000, <http://www.cfit.gov.uk/reports/ebptgerman/02.htm>
- p) Statistics Norway, [http://www.ssb.no/english/subjects/10/12/20/bilreg\\_en/main.html](http://www.ssb.no/english/subjects/10/12/20/bilreg_en/main.html)
- q) National Institute for Statistics 2001 \* calculation by Bogdan Voicu based on cited source (Voicu 2005)