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Determinants of social exclusion in Romania

Doctoral Thesis – Summary

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05 December, 2014

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Keywords: social exclusion, conceptual dimensions, socio-demographic factors, contextual factors, poverty, social policies, quantitative analysis, qualitative analysis

The research is approaching an important problem for the society, because a significant part of it does not have the necessary resources to ensure a decent standard of living; we are solidar with them by providing a minimum social protection (Teşliuc, 2001, Nicaise, 2003). In order that the social policies to be targeted and sized properly, we have to know what are the most affected social groups and what policies must exist to give a proper support on short or long term. To achieve this goal, it is useful to describe these phenomena, but it is more useful to find *explanations* – the causes of social exclusion occurrence.

Regarding the analysis structure of social exclusion, in the first part of the paper, I have deemed necessary to start with the determination of the *theoretical framework* of the social exclusion concept, specifying the conceptual dimensions and its causal determinants. I begin by underlining the distinction between the concept of social exclusion and that of poverty, and I have shown that the first is in addition comprehension and has a dynamic characteristic (Room in Berghman, 1995). The approach of social exclusion domain can be realized on several dimensions, namely: institutional, relational, dynamic and distributional.

The first dimension, the institutional one, that tackles the exclusion concept, both as a *process and as a failure of the integrating institutions*, is rooted in the functionalist social theory of Durkheim. The neofunctionalist theory has as premises the understanding of "social" as a multi-institutional domain that persist through independent and objective relations (Obrien, 2008). Tsaklogou (2003) underlines the role of institutions, and that the social exclusion goes beyond the limited responsibility of the individual. The social exclusion concept states that the common social institutions have failed to fulfill their integrating potential. Even more, the exclusion can be generated by the institutions, because of their policies. *The welfare state policies*, even at their height, have neglected the poor, in several ways, consider Gough, Eisenschitz și McCulloch (2006).

Obrien (2008) deems that the evaluation of the *European agenda of social integration policies* implies that the normative bases of the research program and its generated potential policies are ultimately flawed. Approaching the issue from a different angle, from the perspective of the European institutions, to try a better settlement, in 2000 was established the *Open Method of Coordination*, which provides the coordination framework of national policies, without legal constraints.

The social exclusion, on the next dimension, the *relational* one, refers at the inability to have a *level of social participation*, that society considers usual (Levitas, 2006), but the development of a *European research agenda* revealed some tension between the anglophone

and the continental way of analysis of "the social problem" believes O'Brien (2008). *The requirements that the society has from the individual* are illustrated in the UN concepts of *global poverty* and that of *hybrid poverty* developed by Sen.

A more extensive approach is the one that considers *the sense of belonging in society* of a person as being formed from civic, interpersonal, social and economic integration. *The economic integration* refers to having a job, a valued economic function, to be able to support yourself. *Social integration* means that a person has family and friends, neighbours and social networks to provide care and emotional support when needed. *The civic integration* refers to the equality of citizens in a democratic system (Commins, 1993 apud Berghman, 1997).

Cass, Shove, and Urry (2005) have shown that there is an awareness of social inclusion and citizenship issues related to *mobility and spatial nature* by discourse on access arrangements. Social fragmentation and lack of support social networks might result in increased social distance or isolation, rejection, humiliation and denial of participation (Silver, 2002 Scharf, 2003, Gordon et al. 2000). Social exclusion is a structural process of social isolation that implies an active relationship between the excluded and those excluded. Although sometimes there is a feeling that the excluded retreat voluntarily, it is actually a reaction to the bad treatment received by those excluded (Barnes, 2005).

The concept of exclusion has been criticized for: the heterogeneity of its use, meaning that you can refer to a variety of situations, some with contradictory meanings, and thus avoid extreme situations of exclusion and analysis of their causes; difficulty of making generalizations in relation to the times and stages of rupture, and identifying and combining different converging processes and granting their practical meaning.

As part of the third dimension, *dynamic*, Balsa, Barreto and Caeiro (1999) conducted a *meta-study* to address poverty and exclusion classified into three categories: *historical, structural / institutional and socio-anthropological*. The first approach identifies as causes *different contexts* - social, economic, political - where an individual can be situated, second, *structural features of population and social system*, and the third, *important events in the life of the individual*.

Individual life approach applied to social exclusion is found also at Dewilde (2003), Elder and Shanahan (2006), with three main components: path, destination and turning points. Exclusion happens in time and "determines" the lives of individuals and communities who are excluded and those who are not (Byrne, 2005). Thus, the process may consist of an itinerary with a beginning and an end, and passing through several stages. Thus, it is necessary to focus on the dynamics of and to look for its causes (Levitas, 2003).

Atkinson (1998) believes that social exclusion has important dynamic aspects: people are excluded not only when they have a job or an income, but also when you they have limited prospects, both their own and those involving their children. Gough, Eisenschitz and McCulloch (2006) believes that the processes of exclusion are characteristic of capitalist production and state reproduction process. A person is experiencing a higher level of social exclusion in situations where deprivation is present in consecutive periods (Bossert, 2007).

The last dimension is the *distributional* one, according to which the structure of the system determines the uneven distribution of the resources and of wealth, based on *balance of power*, on *the capacity of different groups* to exercise corporate pressures and to support their causes, on the setting of political priorities and policies targeting; thus, economic growth can be a condition for fighting social exclusion, but it is not enough. Exclusion can be explained as a network of relatively distinct factors that together have an impact, that can be continuous and repetitive, on the standard of living of individuals or groups, being characterised by *networks of cumulative disadvantages* (Estivil, 2003). Hence, the levels of economic vulnerability fluctuate systematically in the welfare regimes, according to their level of inclusion and generosity.

The levels of vulnerability are increasing as we move from the social-democratic to the corporatist, liberal ones. The deprivation regarding the consumption is the main differentiating factor (Whelan, Maitre, 2010). *Uneven spatial development* has different meanings when examined on different territorial scales. As we go from a large to a small region, *the deprivation contrasts* are increasing. One of the difficulties of this type of evaluation is the internationalization of trade, accompanied partially by the opacity of economic power centres, emphasized by the *globalization* (Estivil, 2003).

A consequence of social polarization and social territorial disparities is emphasizing thr *major risks* perceived as a source of increasing inequality and social exclusion: major changes in the labor market, changes in demographics and increasing ethnic diversity, increasing the role of information and communication technology sector, changes in family structure and functions and roles of women and men in the family (Arpinte, 2008).

As a settlement of the social conflicts, Levitas (1998) presents the *redistributionist* interpretation regarding the social exclusion, that has as its main concern *those living in poverty*, and also the causes of this situation. It is argued that only by redistributing wealth throughout society through taxes, benefits and services will be eradicated poverty. It is criticized the idea that individual attitudes are responsible for social exclusion.

Next, I have presented the factors that increase the likelihood of poverty and social exclusion, both at the individual level - the socio-demographic ones, and at community level - contextual factors. Socio-demographic factors are: age - children and the elderly, ethnicity – Roma, education – low, health – poor, social capital – low, material resources – limited, housing – poor, and contextual ones are: employment, social policy, civil rights.

In the second chapter, I continued with the presentation of the *overall picture of the situation of social exclusion in Romania*. First, I showed *an image of the Romanians revenues* after 1990, as their importance is emphasized in most studies of social exclusion. Further, according to the studies reviewed, I noted who the vulnerable social groups are.

Regarding the composition of the sources of income, earnings occupies the most important place in their formation, followed by the social benefits, value of consumption from own resources, and to a lesser extent, income from self-employment and those agricultural (Panduru, Poenaru, Molnar, 2009). The dynamics of real wages recorded the decrease, almost continuously, of the net minimum wage, which in 2000 reached only represent 26.1% of the value it had in 1990, with a sharp drop of 32% in 1997 compared to 1996 (Ministry of Labor, 2010) .

Since 2001, the average net wage increases steadily, reaching in 2008 to represent 130.3% of the value of 1990 (NIS, ASR, 2009 Table no. 1). Regarding the level of relative poverty, it rose from 17.1% in 2000 to 18.5% in 2007, but instead, it decreased the level of absolute poverty from 35.9% in 2000 to 9.8% in 2007 (Panduru Poenaru Molnar, 2009). Recession brought a decline in real wage recorded in the period 2009 – 2011, and from 2012 can be accounted for its growth trend (NIS TEMPO Online, 2014). Thus, one can see the relationship between income and poverty, and can connect with the social exclusion level.

Over 119 million people (24%) of the EU population are considered to be at risk of poverty or social exclusion, and in Romania this percentage is 40.4%. This means that they are affected by at least one of three situations, measured by indicators of risk of poverty, severe material deprivation and people living in households with very low work intensity. For Romania, the percentages corresponding to the three categories in 2011 were 22.2%, about 30% and 6.7% (EUROSTAT, 2012).

Next, I presented the forms of social exclusion and social vulnerable groups. Ilie (2003) describes the following forms of social exclusion: exclusion from education, occupational exclusion, exclusion from housing and exclusion from health services. The multidimensionality of exclusion process is shown by the social exclusion complete maps, which complements regional maps of poverty based on monetary indicators, the *housing*,

education and employment (Pop, 2002). The concept of quality of life, reformatted through the perspective of "combating exclusion from the quality of life", addresses dimensions of quality of life such as: individual, population, natural environment, human settlements, housing, social environment, family, employment, quality of working life, macroeconomic resources for the living standards (Mărginean, 2005).

The study of quality of life is continued in the work *Territorial profiles of quality of life* (Mărginean, eds., 2013), which analyze the dynamic of life quality. Territorial level analysis reveals quite low level of most subjective indicators of quality of life and a counterintuitive conclusion, namely that the most developed region of the country, Bucharest-Ilfov, was in 2010, on the last position in the comparison of the development regions, regarding the indicators on quality of life.

Because the studies in our country, after 1990, focused on the problem of poverty and only relatively late on the exclusion, and due to the proximity of the two thematic concepts, I considered necessary to address the concept of poverty. *Vulnerable groups* are children, youth and elderly, materially deprived people, the unemployed, people living in rural areas, Roma, persons with disabilities. In the next part, I presented the normative method and the method of measuring relative poverty, and attributes associated with a high incidence of it.

The normative method establishes a basket of goods and services that is assumed to be the minimum requirement of a normal life. The method has generated similar concepts as absolute poverty, extreme poverty, severe poverty; *absolute poverty* is the lack of minimum conditions of living necessary for survival in the conditions of a society (Zamfir, 2004, the Ministry of Labor, 2008). Extreme poverty or severe fared relatively linear, but at high risk of permanence, and among the groups most affected by poverty are children, teenagers, the elderly, families with many children, single parent families and families with large numbers of members, ethnic Roma, rural households, the location in the north east of the country, unemployed (Zamfir, 2001, 2004; Ilie, 2003 World Bank, 2007).

The two methods of *measuring poverty - absolute and relative - are complementary*. *Absolute poverty* measures the number of people who can not afford a minimum consumption basket; and that using the *relative threshold*, provides useful information on the relative position of different groups compared with the national standard of living standards in society at a time (Ministry of Labor, 2008). *Relative methods* are based on the idea that poverty is a relative state to the lifestyle of the other members of the community, to what it considers an acceptable minimum life, taking into account the relationship between the income of the community members. *Relative poverty* is defined as the absence of minimum levels of

resources that ensure normal functioning of the person given socio-cultural context (Zamfir, 1994); for poverty analysis is calculated a poverty line (MMFPS, 2008).

Economic growth can have a varied *impact* on those in poverty. To assess whether economic growth raises the living standard of people affected by poverty risk, it can be utilized *the risk of poverty rate anchored in time*; it is adjusted for inflation, being an indicator of poverty reduction. For the most part, *poverty appears to be a transient condition* - a large proportion of households move in and out of this state. Better-educated adults earn more; poverty has negative implications on children education (World Bank, 2003).

In Europe, the EU social inclusion process uses a *relative definition* of poverty which was first established by the European Council in 1975. At the Nice European Council in December 2000, was implemented the decision taken in Lisbon in March 2000, that the fight against poverty and social exclusion, would be best achieved through *open coordination method* (EUROSTAT, 2010).

AROPE indicator measures *the risk of poverty or social exclusion*. It is defined as that part of the population that is at least in one of the following three situations: a) at risk of poverty, being below the poverty line, b) in a case of severe material deprivation, c) lives in a household with very low work intensity. Risk of poverty rate reflects the percentage of people with an equivalised disposable income under the poverty risk threshold; this is fixed for each country at 60% of median equivalised disposable income. Severe material deprivation rate is defined as the percentage of the population that can not afford at least four of the nine components of the material deprivation and economic dimension of durable goods. Work intensity is calculated by dividing the number of months worked by household members of working age to the total number of months of work (Di Meglio and Antuofermo, 2012).

Poverty measures, considered complementary to other measures such as material deprivation, poverty gap and inter-group inequality, give us a deeper understanding of poverty. These measures take into account, in part, the accumulated resources such as savings, supplies, housing, which are not emphasized by income.

After 1990, three main factors have contributed to increased poverty: the erosion of the purchasing power of income, the rapid increase of income differentiation and decrease of social transfer (Zamfir, 1994). Ilie (2003) states that Romanian society had in the last 30 years, a *prolonged period of economic downturn*, that strengthened the poverty and social exclusion. There is a strong association between economic growth and reduction of relative poverty. However, further analysis shows that some areas need attention and intervention policies. The poor have as characteristics the household size, number of children, Roma, head

of the family (women, low education, unemployed or self-employed), rural residence and the Northeast region. Unemployment is particularly widespread among Roma, youth and graduates of vocational schools (World Bank, 2003).

As priority objectives of social inclusion are: increasing employment of disadvantaged people; promoting integrated family policies by implementing an effective package of benefits and social services; continuing efforts to improve the living conditions of Roma.

In the third chapter, I presented the *social policies in Romania*, by defining patterns of social policy, development, components and their evaluation. Also, I presented two major systemic components, the social protection and the social assistance.

I started with the presentation of the conceptual framework, the illustration of social policy models and their political functions. Titmuss (1974) describes three models of social policy, namely residual welfare, the achievement-performance industrial and institutional redistributive. Another approach we meet at Preoteasa (2009), who says that in the literature there are two main categories of *definitions*, which explains the concept of *social policies* by *the political orientation* of social measures, or by their *social character*.

In the general paradigm of social policy, the welfare state crisis in 1970, have put the issue of social policy on the direction of *scientific approach to social problems*. Since the 1990s, appears the concept of *evidence-based policy*, increasing the role of research policy by conducting empirical analysis. Social policy promoted in Romania after 1990 remained one of a *residual type*, with *relatively low addressability*, with areas and populations excluded and socially marginalized, with low levels of social benefits (Zamfir, 2000).

To illustrate how people with a precarious financial situation are being helped, Berghman (1997) propose the concept of *logical chain of politics*. *Social policy* can perform a number of *essential functions* in modern society, such as those of economic and social development, improving living conditions (Mărginean, 2005). On the other hand, Nicaise (2003) conducted an ordering of social protection categories according to *social desirability* in five states of *social protection* of individuals: work, social security, social assistance, insufficient protection and other.

I continued with the presentation of the evolution of social policies; knowledge of the *social situation before 1990* is important because it was the starting point for the construction of new policies and to understand the mentality of the people, which was strongly influenced by existing policies. Their overall aim was to achieve a society that was prosperous but also relatively egalitarian.

In the period 1990 – 2000, it would be able to achieve a better social protection mainly by increasing its funding. All countries in transition have opted for a higher social protection, allocating more financial resources. Low level of financial resources allocated to social protection suggests *minimal state intervention model*, but this model is removed than by the allocation of these resources. The main focus of social intervention was placed on the protection of employees, and not that of the poorest people (Zamfir, 2001). *Social policy has three stages*: reparative, emergency construction phase of a new legal and institutional framework specific to transition to a market economy and the actual transition phase with a social policy primarily reactive, minimalist.

Between 2000 and 2007 the costs of social benefits in absolute value increased continuously, but relative to GDP, their share remained almost constant (NIS, 2009), low compared to the EU and the former communist countries. On the other hand, although their absolute level remained constant after 2007, the reduction of GDP, increased their relative percentage with 5-6%. The largest share of total benefits, had the retirement, health, family and children.

The social protection system can be designed as consisting of social insurance and social assistance, the first contributory - given to those who have contributed to the social system and the last noncontributory. The *first* category includes retirement pensions, unemployment benefits, support allowance for the unemployed, unemployment, work injury insurance, health insurance. In the *second* category, are included people considered being in a precarious state, who are receiving aid and MIG / social support, complementary family allowance and support allowance for single-parent families, aid for heating and persons which is a specific social situation, regardless of other considerations that can receive child benefit, child allowance, financial aid for newlyweds, custody allowance for foster care allowance for newborn babies, trousseau for new-born.

To assess the *impact of social policy on poverty dynamics*, it can be considered two aspects, namely, the financing level of social policies and social protection system configuration. Romanian social policy has not been able to stop the process of impoverishment. Even if the system has many weaknesses, however, a positive aspect is that in Romania, *social protection coverage is high* - over 83% of individuals are covered by at least a monetary benefit, directly or indirectly, as household members, by dividing the income. However, a significant proportion of the poorest people, i.e. 10%, do not receive any benefit. Regarding the type of *transfers*, it appears that almost half of the individuals had in the household at least one source of income from contributory social protection benefits, of

which the most common is for seniority pensions, the loss of working capacity and the farmer. When were taken into account the non-contributory benefits, most coverage have child benefits, followed by MIG and special aids for handicapped (Grigoraş, 2009).

Both contributory and non-contributory benefits, cover to a greater extent, those with the lowest incomes. Social protection system targeting is effective because 37% of contributory benefits and non-contributory bound for the poorest 20% of people. Social security targeting seems to be more effective than social assistance, as the poorest quintile receive more than 20% of contributory benefits, while the non-contributory benefits are more evenly distributed across income quintiles. The most important transfers aimed at reducing poverty are the *family and child, benefits for utilities and MIG*.

Risk of poverty rate before social transfers, compared with that after their receipt, shows that transfers have an important redistributive effect that helps reduce the number of people at risk of poverty. Social transfers have significantly reduced the number of people at risk of poverty in 2010 in the EU from 25% to 16% and for Romania the decrease was from 27% to 21% (Antuofermo, 2010).

The social security system has as main components *the pension system and the unemployment insurance system*. *Social assistance system* has the following main types of benefits, by their share in GDP, the state allowance for children (34.5%), child allowance (19.5%), monthly allowance for adults with serious and severe disability (15%) monthly complementary personal budget for persons with disabilities (7.3%), social support to ensure guaranteed minimum income (6.8%) (MMFPSPV, 2014).

Amongst *categorical and selective social assistance benefits, complementary allowance and support allowance for single-parent families* are the most extensive selective programs for financial support to families with children, targeting families with precarious financial situation. *Universal social assistance benefits* are granted *without testing livelihoods* of single person or family. *State allowance and child allowance* is allocated since 1990 under Decree 410/1985.

In the fourth part of the work, which includes quantitative analysis methodology, I analyzed the empirical determinants of social exclusion on the available data, presented results of analysis and continued in the next chapter, with the qualitative study, where I used focus group interviews, individual interviews and case study technique. I analyzed the data from the research study *Quality of Life in Romania*, during 1990 – 2006, and for 2010 I used the database of the *Eurobarometer no. 74.1* and for 2013 *Eurobarometer no. 80.1*. The concepts used in the study I operationalized by questions from the survey questionnaires.

The dependent variable, social exclusion, was defined as multidimensional and has four dimensions. First, the lack of economic integration, means the person does not have a job; next, not integrated in the system of social benefits: earn less than 60% of median income logarithm of the economy and does not receive social benefits. The third is the lack of integration interpersonal: has bad relations with family / friends / social network (a form of capital) and the last is lack of civic integration: low civic participation (Almond and Verba, 1963).

After analyzing the literature, I identified several *explanatory* dimensions of social exclusion. One of these is the socio-demographic attributes of individuals with vulnerable specified. Next, I presented the *theoretical model* of the social exclusion factors influence.

I made the explanatory analysis of social exclusion through *logistic regression analysis* (Agresti, 1996 Burns, 2008), through which we simultaneously determine the impact of multiple independent variables to predict membership in one or more of the categories of the dependent variable. *The social exclusion model* has a dependent variable with four dimensions: one can be excluded on one or more dimensions, and the independent variables are socio-demographic and contextual ones. In the next part, I presented the explanatory factors of social exclusion dimensions.

Descriptive analysis of social exclusion in Romania analyzed the on the four dimensions, provides a clear picture on the magnitude of each. The less problematic is the economic dimension, so that it can be said that people are generally integrated in this regard; even if wages were generally small or modest, their level was enough that people were not excluded. Integration in social benefits system shows the influence of social policies to protect low-income population, independently of the economic factor. Interpersonal dimension that marks the turning years of growth in 1991, 1998 and 2013 and downward 1999 and 2010. The civic dimension shows significant changes in some years, positive in 1993, 2003 and 2013 and negative in 1992, 1997, 1999, 2006 and 2010; expectedly, they can be correlated with the level of satisfaction given by government.

The results show the most exposed social groups, most in need of social protection, and the attributes that may reduce social exclusion. *The theoretical model on the influence of socio-demographic factors is confirmed mainly for economic and social benefits system integration dimension, and less for those of interpersonal and civic integration.*

In the final part, I presented the main conclusions regarding the determinants of social exclusion. At the decrease of exclusion has contributed all its dimensions, the high level of education, revealing itself as the most important factor. This has a strong impact on the

economic dimension of integration, and for the social, interpersonal and civic one is moderate; however, for the last dimension, the influence can be also reversed. At average level, for the economic dimension was rather leading to less integration, but in the expected direction for the interpersonal dimension.

Nationality - Roma is relevant for economic dimension, although the direction of influence is both for exclusion and inclusion, so it is quite unexpected that Roma do not appear to be largely excluded on the economic axis. However the non-integration in the system of social benefits, the interpersonal and civic, the exclusion trend is much clearer and stronger.

Urban residence appears as moderate factor in the economic and civic exclusion, but moderate for inclusion on the dimension of the social benefits system integration, and reduced joint influence on the size of personal integration.

Adults are very well integrated into the economic dimension, and the elderly are well integrated into the social benefits system, most of them with pension that provide integration into society. Instead both appear not integrated into interpersonal relationships, adults - moderate and elderly - powerful, and in terms of civic influence is statistically insignificant.

Current occupation - unemployed and student, has bidirectional influence on the dimension of social benefits, so that the result is dependent on the social protection policy, which can be more or less inclusive: that is, we see the importance of social policies that can combat social exclusion. Occupations that promote professional collaboration correlate with a higher level of interpersonal relationships.

Married individuals are moderately integrated economically and in the social benefits system, but for the divorced, it is possible both the exit and the entry into the process of economic exclusion, phenomena which manifest themselves with fairly high intensity, and moderate on the interpersonal dimension integration and in the system of social benefits.

As the family has more children, the probability of economic non-integration increase, being very affected households with 2 or more children. However, this is largely offset by the inclusion of households in the system of social benefits for families with one or two children, but not for those with three or more children. Families with three or more children are rather excluded for interpersonal relationships until 1998, but after 1999 we are witnessing a trend to integrate them. The category does not appear to be statistically relevant in terms of civic inclusion.

Women were more likely than men to be economically integrated and the direction of this trend has been constant throughout the period 1991-2013.

The possession of durable goods, such as possession of a car or a house, is associated with a moderate decline in the economic exclusion, social benefits and interpersonal system.

Qualitative analysis has shown the importance of the four dimensions of social exclusion. For the economic dimension, interviews with young people have revealed the existence of *contextual factors*, of social type, but also *factors at the individual level*. Regarding *the level of social benefits*, there is both a opinion that they are too low, with a specification to those granted to students, but these must be conditional grant and a another one, according to which they should not be granted because they lead to dependence among the assisted social or even the system of social benefits is largely defrauded. *Family relationships or those friends* are important in influencing the level of social exclusion because they can be tense or tight, providing or not the individual with resources to overcome certain difficult situations.

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