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**ANALYSIS OF THE PUBLIC PENSION SYSTEM BETWEEN**  
**ECONOMIC CRISES AND STRUCTURAL REFORMS DURING 2000**  
**AND 2021, IN ROMANIA**  
**(Ph.D. Thesis Summary)**

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## **1. Research purpose and objectives**

The main purpose of this written paper is to carry out a comprehensive and objective analysis of the public pension system during the period between 2000 and 2021, in Romania, from a qualitative perspective (through a specific legislative analysis), and also from a quantitative perspective (through an economic and social indicators analysis). This radiography of the public pension system, in Romania, is more than necessary due to the fact that both legislative parametric and structural elements led to a significant financial deficit, an increased level of public debt, and an ever-increasing number of elderly people's exposure to poverty risk and social exclusion.

Through this scientific approach, I intend to analyze the research issue seen from two perspectives, as follows:

- from an administrative perspective, by analyzing social policies and specific legislative mechanisms and leverages used by the state apparatus in order to ensure adequate pension incomes as well as legislative proposals which were not inserted nor found in current practices;
- from an economic perspective, by analyzing some economic indicators such as the budget deficit, public debt, contribution rates, system dependency rate, replacement rate, existing inequities between retirees, and gender inequities.

The present written work has an exploratory, descriptive, innovative, and comparative character that aims to explain the reforms motivation of the public pension system, in Romania, its evolution over time as well as the way in which the state apparatus has honored its pension obligations toward the enlisted participants in the system.

The main research objectives refer to:

- O1.** The inventory of the reference documents that were the basis of the evolution of the European social protection system;
- O2.** The assessment of the parametric elements that influenced the operation of the public and unitary pension system in Romania;
- O3.** The analysis of the public pension system's sustainability viewed according to some economic, financial, social, demographic, and technical indicators perspective that has influenced the operation of the public pension system in Romania;
- O4.** The analysis of imbalanced results caused by legislative measures of public pensions adequacy;
- O5.** The resilience assessment of public and unitary pension system, in Romania, and territorial disparities;

**O6.** The identification of the main ways and moments in which legislation intervened within the system, to add durability and resilience to it;

**O7.** The assessment of gender inequities is viewed from the perspective of the influence factors over the earned income of men and women, as a fundamental element for the public pension's calculation.

Even though the main purpose of the investigation is quite wide, with the help of the established objectives and the analysis methodology, starting with theoretical investigations way to data analyses, we hoped to obtain results that would provide a conclusive picture of the current pension system, in following allowing us to make some recommendations for a more efficient system.

The increased interest in efficient wage policies is based on the belief that labor remuneration is no not only a consequence, reflected also on public pensions, but a functional premise for an efficient economic and social framework. In Romania, gender differences when it comes to labor remuneration, are among the highest within the European Union. Wage disparities and extended precarious forms of employment (like part-time, at the minimum wage in the economy, with the bilateral agreement of the black-market labor) have been on the front page of public agendas for a long time. We shall focus on acknowledging the impact of education and acquired skills on pension income throughout the lifetime, on labor remuneration, and existing discrepancies within the women and men payroll during the analyzed period but also on the intensity of work, emphasizing, in this case, the factors that affect the achievement a lower contribution period in comparison with men.

The research sought to identify the existence of a consensus regarding the European and Romanian legislative process, in the field of public pensions, during the period of 2000-2021, both in terms of economic, social, or political evolution, as well as within the system's structural and functional means, the flexibility of work and retirement conditions, mobility or portability of pensions, alternative saving, and daily life's well-being.

## **2. Thesis structure and content**

The introductory part of this thesis includes aspects related to the research problem identification, research purpose, and objective, the methodological milestones and motivation for choosing the theme, interest derived from the elderly problems complexity and life's quality reduction, the risk of poverty growth, social inequity, the incomes inadequacy, the amplified

addiction towards the system's social protection and the absolute need for state's intervention and support.

This written paper is structured over six chapters, each one of them aiming to analyze both ways, meaning from an administrative perspective as well as from an economical point of view, the legislation of the public pension system in Romania, during the period of 2000-2021. Chapter VI is specifically dedicated to the field's specialist's opinions debating over the validation and support of the expressed ideas within the theoretical course of the present thesis.

The achieved objectives analysis concerning the pension system in Romania could not be done without integrating the research into a European legislative context as well as into the main directions and policies in which we have engaged since 2007, beginning with the moment of the European Union integration. We comprehend that the European political and social project was quite an ambitious one and targeted the desire of creating a European identity, promoting common social policies, economic growth, and social cohesion that respond to the problems of the Member States.

Thus, the first chapter (The European legal framework in the field of social protection. A qualitative and quantitative approach to the social insurance system) presents the evolution of the European legislative framework, reforms, and links used in order to achieve a functional social protection system, during the period of 2000 and 2021, but also the main regulations designed for public pension systems.

Without a unique model on the operational sustainability and viability of the European pension systems, the European legal framework supported by the Member States when it comes to individualizing the basic parameters on a validated pension right (such as retirement age, required contribution period, amount of contributions, organization method of the system, etc.), is present in all public pension systems. In terms of logic, the present decision generated an increased diversity of pension systems which are nevertheless economically, socially, and demographically dependent on the prerogative specifications of each state. But obviously, what caused the alteration of calculated parameters, demographic dynamics, and economic crises were those factors that led governments around the world to adopt cyclical reforms in the social protection system, to face the problems of financial sustainability and income adequacy. Moreover, the social protection mechanisms have mainly maintained their *indemnity character* (fundamental on a triangular-shaped scheme drawn by employees - contributions - benefits), and their established amount is closely related to the professional income that it replaces. Through means of order, the social protection system had to respond also to other needs

required by third age holders such as medical services, benefits, and social aids, in addition to pension expenses.

The second chapter (Pensions - as the main form of social protection within the state's social insurance) narrows the analysis inner circle of the social protection system focusing only on a retrospective analysis of pensions legislation in Romania, emphasizing an analysis built up over the period of the last twenty years. By comparison, two reforms that marked down the above-mentioned period were analyzed, reforms like public pension system legislation during the period of 2000 and 2010 (under the rule of Law no. 19/2000) and the unitary pension system legislation during the period 2011 and 2021 (under the rule of Law No. 263/2010). The present-day challenge, enshrined in the fundamental objectives of social policies in Romania, consists in granting permanent, adequate, and financially sustainable replacement incomes to an increasing number of retirees for a longer period of time.

Chapter three (Financial sustainability of the public pension system in Romania) includes the analysis of economic, social, demographic, and technical indicators derived from legislative measures for guaranteed viability and sustainability of the system. Random legislative measures have led to economic and financial imbalances as well as to inequities between retirees, lacking a long-term vision, amplifying the financial effort on the state's behalf, encouraging unemployment, and generating problems for the reform process and for an effectively functional social protection system.

The fourth chapter (Resilience of the public pension system in Romania and territorial disparities) presents the main channels through which the state intervened in the viability and resilience of the public pension system, caused by the succession and velocity of demographic changes and amplified by the existing migration phenomenon as the economic crisis: the benefits payment due to the lack of a social assistance system, the permanent adjustment of income parameters of the state budget, the shaped calculated parameters of pensions (pension age, contribution period, social contribution rate), the increasing degree of employment rate by means of labor force provided by the young generation. At the same time, the analysis of statistical data allowed us to evaluate the impact of the two crises (from 2008 and 2020) on a targeted number of employees and retirees, on regional incomes generated by pensions and to highlight the frequency of elderly people, among the total number of vulnerable people, categorized on development regions.

Chapter five (Gender inequities typology reflected on public pensions in Romania) analyzes gender inequities from the perspective of a professional profile and labor remuneration generated during a period between 2000 and 2021, as manifested by the

application adopted legislative acts as well as the political projection of public national and European policies. The increased level of gender inequalities was an associated problem mostly derived from persistent wage gaps and first and foremost caused by shorter working hours for women. Working time patterns have changed considerably in the last two decades, due to technological causes, globalization, economic restructuring, and changes in family and societal priorities. Mild flexibility is definitely the key element for present times in which we should be friendly to both, the employee and the employer. The postponement and unresolved issues on flexible working time, for women, are currently projected on pension incomes. The cancelation of wage and pension inequities, between women and men, involves both economic and non-economic aspects, generally related to family responsibilities (children, elderly parents, etc.)

The final chapter, the sixth one (Specialist's perception on causes and factors that influenced the public pension system reforms, in Romania, over the period between 2000 and 2021) was dedicated to field specialist's expressed opinions, regarding causes and factors that determined the reforms of the pensions system. With the help of a structured interview, divided into four parts, we sought to identify the causes that affected the sustainability of public pensions in Romania over the past twenty-one years, way back since 2000. In the second part of the interview, we desired to identify the factors that influenced the public pension system reforms, while in the third part, we aimed to identify possible reform solutions. Professional experience or age can generally be a criterion for validating certain points of view, in the case of a specified subject.

The last part of the thesis includes conclusions, recommendations, and limitations of the research, as well as potential directions for future research.

### **3. Research Methodology**

Considering the complexity of the topic as well as the extended analysis period, the present research is part of the qualitative study's inner sphere, particularly used within the arsenal of social research but also of administrative ones. The methodological aspects of the thesis pursued a scientific approach to the specialized specific works, by establishing means of main research objectives based on the public pension system's analysis, in Romania.

The elaboration of this paper focused on studying the theoretical, legislative, empirical, and comparative aspects of the system, by using qualitative data collecting methods, mainly document analysis, and multi-criteria comparative analysis, as well as conducting interviews with specialists and practitioners in the field.

The documentation stage consisted of theoretical research of official, national and European documents, mainly those of a normative nature (laws, ordinances, government decisions, and Directives, Resolutions, or Treaties) that regulated public pensions at a European and national level. Focus was oriented on various reports of national institutions (CNPP, INS, MF) such as budget executions, annual financial statements, various reports, and specific centralized statements. The theoretical research was completed with statistical data, intended to complete the assimilated information, which allowed us to evaluate the dimensions of the studied phenomenon. Statistical data sources were, mainly, official websites of Eurostat, the European Commission, IOM, OECD, CNPP, INS, and MF. The second stage, in research, consisted of the elaboration of the analysis matrix and had as starting point the construction of the research methodology and the necessary tools to achieve the stability objectives. In the third stage of the research, the research tools were applied after which collected data were analyzed and interpreted. The final stage of the research consisted in summarizing the data and information obtained during the research phase.

In Chapter One I analyzed the evolution of the European legislative framework, reforms and levers used for an operational social protection system, during the period between 2000 and 2021, and designed regulations also on public pension systems.

The purpose of the first chapter was to analyze the European legislative benchmarks in the pensions field and to identify the causes of the reforms, the analyzed period's economic context, and the European legislative chronology, emphasizing European strategic objectives and social policy directions.

The fundamental objective of the first chapter was to inventory the reference documents that were at the base of the evolution of the European social protection system, paying particular attention to those specific to public pensions, aiming to answer the following research questions:

**Q1:** Has globalization affected social protection and pension systems?

**Q2:** How has the European legal framework evolved in the field of public pension systems?

**Q3:** What were the causes that determined the reforms of the pension systems?

**Q4:** How have European projects reflected on the quality of life of pensioners?

In order to answer the research questions, data collecting was carried out with the help of *document analysis*, a method used within the arsenal of social research, in particular, but also within administrative sciences. As the extended period of analysis has been given, the subject's context in which it was carried out as well, the research method used provided us with answers concerning research questions that followed as the European reference documents



analysis was unrolled (Directives, Resolutions, Treaties, Strategies), and opened up for us the perspective of European policy directions, used as benchmarks in the organization of national social protection systems.

I have adopted and used the same research method for the quantitative research of the data presented within this chapter, mainly using secondary data sources (data collections of some European institutions, Eurostat databases, ESSPROS, World Bank, and OECD). The relevance and clarity of some indicators were conferred by the use of the comparative method, using mainly time variables series, correlated with economic and social indicators.

The briefing, within Chapter II, of the pension system history, in Romania, opened up the perspective of analyzing the elements that contributed to the functioning mechanism of the pension system, during the period of 2000 and 2021 (the taxpayer, the social insurance contribution, contribution period, social insurance contract, standard retirement age, pension beneficiary, system manager, insured risks).

The purpose of Chapter II was to carry out a broader analysis, which includes, in addition to the parameters of pensions calculation, elements of the administrative framework of the entire pension system.

The objectives of the present research consisted of the evolution of the public and unitary pension system analysis, in Romania, the dynamics of the system components analysis, and the interconnection between each other, as well as the causes that determined the reforms in the system, in the twenty years.

The questions I answered in this chapter are:

**Q1:** What are the elements of the public pension system?

**Q2:** How did the relationship between them evolve during the research period?

**Q3:** What is the content and evolution of the types of pensions in the public system?

Considering the role of each element in the functional mechanism of the public pension system, the study was carried out by presenting the evolution of each element and its specific characteristics, in a time horizon covered between 2000 and 2021. In this case, in order to carry out the most complete analysis of the aspects mentioned above, we chose as a data collection method the *document analysis*, which allowed us to obtain information regarding the legislative course of each studied element.

The same data collection method was also used to carry out the quantitative analysis of the elements of the public pension system (contribution rates, contribution periods, retirement ages, number of pension beneficiaries, number of taxpayers, etc.), data from secondary sources (Eurostat, INS, CNPP, ANAF).

For the systemic elements links analysis, we also used the comparative method, using as main variables time series, age groups, and gender. The comparative method helped us to evaluate indicators regarding the income from social insurance contributions, the change in contribution periods during the analyzed period, the evolution of retirement ages, the analysis of retirees according to the period of experience (complete or incomplete), as well as the evolution pensioners by pension category.

Chapter's III purpose was to analyze the financial sustainability of public pensions, from the perspective set of dimensions (economic-financial, social, demographic, and technical), in order to quantify how the public pension system in Romania honored its financial obligations toward retirees, during the twenty years analyzed by this scientific approach.

From the perspective of the economic-financial dimension and with the help of the research method used (documents analysis), the specific objectives for this chapter were as follows:

**O1:** dynamics of economic indicators analysis that influence pensions (gross domestic product and social protection expenses and, in particular, with pensions);

**O2:** analysis of the indicators that influence the updating of pensions (revenues and expenses of the state social insurance budget, the budget deficit, and the inflation rate);

**O3:** quantification of tax evasion, especially from undeclared or underfunded work;

**O4:** analysis of transfers from the state budget in the form of subsidies;

From the perspective of the social dimension, the specific objective I aimed for was as follows:

**O5:** analysis of the social indicators that influence pensions issue, respectively the employee/pensioner relationship's dynamics and the indicator of poverty risk at work.

Starting with the essential role of the workforce and employed population in the redistributive pension system operation and financing, we've considered it also important to analyze the employees' and retirees' dynamics by means of the professional category (including those from MAI, MApN, SRI). Due to the fact that the risk of poverty has become a sensitive topic among retirees, the risk of poverty indicator at work could not be missed within the analysis of the social dimension.

From the demographic dimension perspective, some specific objectives were pursued, as follows:

**O6:** analysis of demographic indicators that influence the sustainability and adequacy of the pensions, respectively the evolution of the elderly population, life expectancy within the range of 65 years old, future forecasts of the evolution of retirees share;

From the technical dimension perspective, the specific objective we proposed were, as follows:

**O7:** Some calculation parameters analysis of public pensions, such as retirement age range and the actual retirement ages, working life length for women and men, the evolution of the average social insurance pension, value of the pension point estimation, etc.

In order to achieve the objectives, we used document analysis to collect qualitative data, based on secondary sources data (CNPP, INS, MF, Eurostat) for the targeted research period. Also, within Chapter III, we considered it necessary to analyze the resulting imbalances as a result of efforts to adjust pensions, as well as its effects.

Thus, this subchapter's purpose was to analyze, over time, the normative acts adopted for pension updating (through indexation, recalculation, and correlation). Pension's adequacy measures effects were translated into strong imbalances, which is why the scientific approach focused on some impact elements analysis, such as the capping of social insurance contributions and transfers to Pillar II of pensions, the persistent inequitable treatment between beneficiary's public pension system and beneficiaries of non-integrated systems. In order to understand the adequacy measures of public pensions, in Romania, we made an inventory of the legislation that regulated this process, starting with the year 1990 until the year 2021. The specific legislative volatility in the period 1990-2000 could not be omitted from the analysis because was responsible for many subsequent inequities and imbalances.

The fundamental objective of this scientific approach was to achieve radiography of the public pension system, in Romania, from a perspective angle of how to regulate income adequacy.

The research question to which the answer was sought was: *How was the public pension system in Romania adequate during the period between 1990 and 2021 and how were these regulations transposed in the system?*

In order to achieve the objective of this subchapter, we used as a research tool the *analysis of the document*, mainly to analyze the normative acts that have regulated the pension system, in Romania, for the past 30 years. To answer the research question, we've analyzed the regulating the adequacy of the pensions process, for decades, focusing the analysis on those four laws that have regulated the pension system in Romania for the past 30 years: Law no. 3/1977 regarding state's social insurance pensions and social assistance (first decade), Law no. 19/2000 regarding the public pension system and other social security rights (second decade), Law no. 263/2010 regarding the unitary system of public pensions (third decade) and Law no. 127/2019 regarding the public pension system, insofar as it is applied.

Chapter's IV purpose was to carry out an analysis of the resilience of the public pension system, in Romania by means of a " Study case on the resilience of the public pension system

during the period of 2001 and 2021 and territorial disparities" and the ordered measures during the year of 1990, without which the analysis would not fully support and justify.

The fundamental objective of Chapter IV was to identify the main ways and moments in which legislation intervened in the system, in order to give it durability and resilience. The specific objectives established consist of:

**O1:** Regional impact analysis over two crises (the average number of employees and retirees) during the period of 2000 and 2021;

**O2:** Identification of ordered measures during this period that conferred resilience and sustainability on the public pension system, in Romania.

To achieve these objectives, we've used the analysis of documents as a research tool, especially on the analysis of specific legislation of the past 30 years, but without focusing only on it. We also aimed to analyze the regional impact of the two crises, from the perspective of indicators - the average number of employees and retirees - during the period of 2000 and 2021, with a special focus on budget subsidies, as a balancing factor of the balance of payments of pensions.

Considering the unique character of the resilience of the public pension system approach, in Romania, the research question to which we sought an answer was: What were the main measures, required for the past thirty years, which conferred resilience and sustainability on the public pension system, from Romania?

To answer this specific question, we've analyzed the chronology of the legislative process around the fundamental legislation (*Law no. 3/1977, Law no. 19/2000, Law no. 263/2010, and Law no. 127/2019*), as well as secondary legislation modifiers of the basic ones.

Considering the fact that public pension is a product of work, in the study of persistent gender inequities among Chapter V analyzed retirees, I've considered it necessary to carry out an intersectional work analysis but also an analysis of the elements that influence this process. The intersectionality paradigm is important in the public pensions field, due to the fact that certain identity dimensions such as education level, skills acquired during life, work remuneration, work intensity, working conditions, years worked, and age can constitute factors of inequality between women and men when establishing the pension.

Thus, the purpose of the present analysis of the inequity factors in this subchapter was to identify the typology of gender inequities in the field of pensions. To achieve this goal, we've set the following objectives:

**O1:** Identifying the causes of existing inequities by pension categories between women and men;

**O2:** Analyzing the factors that influence the incomes achieved during the active period by women, as a fundamental element for calculating the public pension.

The research question to which we sought an answer: *What were the generative causes of gender inequities regarding public pensions?* To answer this question, we've analyzed the relationship between work and work remuneration, by gender, and how it was projected on public pensions.

Starting from the incomes achieved during the active period, as a fundamental element for the calculation of public pensions, we've analyzed the connection between the factors that influenced this parameter: the education level and skills acquired during life, work remuneration, work intensity that is transferred to incomes salary and pension implicitly.

For the achievement of targeted objectives, we've aimed the *document analysis* as research data, to identify factors and causes of pension inequities, between men and women, between 2000 and 2021, with the help of specific indicators: employees proportion differentiated by gender education level, inactive population, vocational training program participation by age group, average gross and net earnings by gender, gender wage gap, employment rate by gender, etc.

We've considered that the theoretical research would not be complete if it wouldn't supported by field specialists' opinions, on the analyzed topic.

Therefore, Chapter's VI purpose was to validate the obtained results during the elaboration of the present doctoral thesis, the reason why we've asked for field specialists' opinions, on the analyzed topic. We desired to obtain as varied answers as possible from field specialists, especially those civil servants who have either worked in the field of public pensions or are still active specialists in the system today, as well as from different institutional levels, the reason why the study it was also extended to the officials who have the competence to verify and use budgetary resources from public funds. Last but not least, I've considered that some reform's ration and its customs will be understood even better by appealing to the opinions of political decision-makers, who either coordinated the public pension system or actively participated in the system reform process.

Thus, for data collection, we've used a qualitative research method - *the interview* - and according to the structuring degree, we've used a *structured interview guide* as a tool, to fulfill the objectives of the analyzed problem. The interview was addressed to the field of public pensions specialists and practitioners from the County Pension Houses in Romania (42 institutions), who, due to the specifics of their activity, participate in the process of establishing public pensions. The reason for addressing this hierarchical level was to understand the

analyzed problem from a technical point of view (legislative interference, pension calculation parameters, observed effects), with the help of the interview guide, transmitted through electronic communication channels (e-mail) of the institutions.

Concerning the second hierarchical level to which we've addressed and hoped to obtain conclusive answers regarding the research problem were the driving factors, understanding specialists included in the activity of management, coordination, and control at central and territorial levels (National Public Pension House, County Public Pension Houses, territorial control structures) as main factors in "ensuring the financial sustainability of the public pension system based on the principles of contribution and social solidarity and eliminating the inequities and anomalies that still exist in pensions" (CNPP, Objectives).

The main interest regarding public sector specialists and NGO's points of view, as responsible factors in issues concerning elderly age aria and their needs, continued by transmitting the interview to a county structure, subordinate to the Prefect's Institution, which is composed of fourteen representatives of public institutions and NGOs. We also addressed the Association for Retierees' Rights in Romania (ADPR) to find out different points of view compared to those from the public sector or those from the local level. We've hoped to obtain conclusive and punctual opinions from specialists of non-governmental organizations, concerning the causes and factors that influenced the pension reforms in Romania, as well as possible solutions for their sustainability and adequacy.

Last but not least, we've desired to get opinions on the researched topic from the political decision-makers who coordinated the relevant ministry.

The used criterion in selecting the group of respondents was a professional experience in the field of public pensions. This criterion determined the narrow and homogenous nature of the specialists we approached.

#### **4. Main achieved results**

The main results of the research derived from the cumulative areas of investigation of public pension system reforms and are meant to highlight a series of opinions that are consistent with the points of view expressed during the theoretical research. Starting from the analysis of four dimensions of the financial sustainability of the public and unitary pension system (in terms of economic-financial, social, demographic, and technical points of view), in Romania, and correlated with the established goals in the Interview Guide (the reforms causes, factors that influenced sustainability, system reform solutions) we can provide certain results, as follows:

The European reference documents analysis that marked the researched period, more accessible especially since Romania's integration into the European Union, allowed us to understand the directions of European social policies and the actions for modernizing and strengthening our policies in the social protection field. The European Union pursued the elderly social protection from poverty and social exclusion, ensuring adequate legislation against discrimination, financing projects focused on fighting against discrimination, and facilitating the access of disadvantaged people to the labor market.

Moreover, the EU regulations on social protection systems have encouraged and facilitated labor mobility and implicitly guaranteed the rights derived from the activity for mobile workers. Labor's free movement of equal tax treatment encouraged the transferability of pension rights between states. The social protection system's vulnerability resides in its dependence on the labor market, on economic and fiscal policies, on the disturbances of the inflation rate according to which the budgetary commitments of the system are established, as well as on demography. Those two economic crises had an extremely strong impact, aggravated and amplified the trends towards the aging of the population, therefore European states encountered problems in the adequacy and sustainability of public pensions. The social protection system was rethought and reset, in the period 2000-2021, depending on the sensitivity of the two components (population aging and the labor market), to respond to the challenges.

The study's bottom line is that without adequate economic and fiscal consolidation, favorable for economic growth, the social insurance system will not be able to honor its insured risks. Thus, social policies remain current topics, to ensure, as now as in the future, adequate and viable pensions.

The public pension system's reforms, in Romania, adopted over the years, aimed mainly to limit access to a pension category, by reducing the number of pension beneficiaries and granting adequate and sustainable incomes that would provide stability, balance, and decent living conditions. The levers through which the state acted in this regard were the application of higher penalties for early retirements, the tightening of the conditions for access to disability pensions, the increase of the retirement age, and the contribution period necessary to open the pension right.

The concern for ensuring the viability and sustainability of the system has generated acute negligence towards the inequalities and gaps created between the same categories of people, who retired during different years. Until the private pension funds' development and accumulation, current retirees benefit from income provided by the Pension Pillar I (PAYG),

to which all the employed population in Romania contributes for the time being. The income received in a form of a pension, from the redistributive type system, represents the main source of income guaranteed by the state and individualized on behalf of each beneficiary, according to the principle that governs the current pension system, contribution.

Without an existing default pattern for the sustainable and viable functioning of the European pension systems, the member states have individualized their basic parameters that validate a pension's right (such as retirement age, the required contribution period, the number of contributions, the way the system is organized, etc.) that can be found in all public systems, the logic of the given situation is being dependent on the economic, social and demographic conditions that belong to the prerogative of each state. Governments around the world have been driven to adopt cyclical reforms to deal with financial sustainability issues. By way of organization, the social protection system must also respond to other third age needs: through means of medical services, benefits, and social aids, in addition to pension expenses.

The current form of the public pension system in Romania is the result of an extensive analysis process, both at the European and national levels. The aging of the population turned out to be a faster process than expected, which is why concrete measures were imposed on the public agenda for such a vulnerable and sensitive age segment.

Following the analysis of the dimensions (economic-financial, social, demographic, and technical), it has been highlighted that the public pension system's financial sustainability was influenced by the dynamics of the analyzed indicators, under the impetus of the two crises.

The importance of the economic dimension resides in the fact that income adequacy was related to the evolution of the gross domestic product, according to which an increased social insurance pension was established, in order to maintain the purchasing power and quality of life for retirees. Considering that the pension expenses annual budget allocations have remained approximately constant, during the period of 2000 and 2021 (7-8% of GDP), except for economic crisis and pandemic periods, when they were much higher (8- 9.5% of GDP), the evolution of average, gross and net pensions, were conditioned by the evolution of GDP and inflation. If we also add the differences between the standard retirement ages and the effective ages at which the pension right opened, we understand the impact of the increase in the poverty risk rate, in over twenty years.

The social dimension was represented by the active workforce, the main provider of social security which also had a strong dynamic, especially after Romania's integration into the European Union. The changing ratio of wage earners to retirees has limited pension income, and this imbalance has put more pressure on the active workforce.



Last but not least, the technical dimension that tried to fix, through parameter adjustments, the effects of the other dimensions. The effect of the reduced effective retirement age was influenced by an increase in the contribution period, granted for working conditions at the actual length of work performed, which masked an effective, reduced contribution period. All these shortcomings, generated by some decisions, not in line with the economic reality of the country, exists also those of the Constitutional Court that expanded the reason for applying the law.

In our analysis, we managed to cover a very large temporal area (twenty-one years), which is why we can issue some conclusions, following the data analysis.

First and foremost, the need for financial security determined a strengthening of financial discipline, by limiting budget deficits. Romania faced this problem since the first year of joining the EU, due to the generosity and legislative flexibility that led to an increase in budget expenditures, which is why the sustainability of public pension systems has always been a problem.

Secondly, the increase in social protection spending was determined by the effects of the two crises (2008 and 2020), which amplified the need for social security and purchasing power of retiree's retention, ignoring budget deficits.

A shortage in the labor force, as well as an increase in the elderly population caused by the massive migration of the labor force, abroad, but also the aging of the population, contributed to all these shortcomings. The impact of these indicators is strongly felt in Romania as well, generating an increase in budget expenditures, among the highest in Europe.

Therefore, the configuration of social and pension policies should take into account the fluctuation of social and demographic indicators, able to generate real economic and financial problems.

From the inventory of the normative acts that regulated the issue of pensions adequacy, in Romania, during the period of 1990 and 2020, divided by decades to observe their evolution, we have concluded that "in the first two decades the legislative multitude (74 normative acts) had the role of intervening in the updating of pensions, due to the rapid deterioration of the salary/retiree's ratio and implicitly of pensions. The reactive nature of the regulations led to a lack of predictability in the public pension system, including for specific expense planning. The last decade analyzed (2010-2020) was characterized by a reduction of the number of the regulation concerning pensions adequacy, by transposition into national legislation of some EU directives and recommendations, but also by new challenges generated by the current developments in demographic data (decrease in the number of workers, the increase in average

life expectancy) that imposed changes in the retirement age and the method of calculating the adequacy of pensions" (Macarie, Vîtcă, 2021, pp. 309-310).

The main feature, regarding the capping of social security contributions, was decisional instability. We observed periods in which there were no income limits on which social security contributions were due (2008-2010; 2017-2020) as well as periods of limitation of social contributions payment, up to the level of five gross average salaries per economy (2011-2016). These periods were marked by serious budget deficits. Factors cumulation does not allow recognition of their severity or ranking. It is a certainty that the period limited by capping the payment of social contributions (2011-2016) coincides with the recovery measures required due to the global economic crisis, including within the public system of retirees from non-integrated systems (MAI, MApN, SRI), with the measures updating pensions in payment. But considering the role played by social contributions in the overall functioning of the adequacy and payment of pensions, we believe that this was an inappropriate measure for Romania, due to the budget deficits it faced during the analyzed period.

The unfair legislative treatment, towards the categories of retirees not integrated within the public pension system in Romania, generated much dissatisfaction among people, on the one hand, and budgetary effort on the other hand, for pensions payment. In addition, the segregation of the retired population generated financial and moral imbalances.

The functionality of the unitary pension system within the period 2011 and 2015 and the establishment of pensions on a contribution principle targeting all professional categories, failed. Therefore, the return to individualized and non-integrated systems was done without too many reservations, for the same professional categories (parliamentarians, consuls, auditors, aviation personnel, etc.). The differentiated treatment at retirement age, from the perspective of the professional criterion, was also maintained by Law 127/2019, and our conclusion is that the budget deficit will worsen due to the need to maintain purchasing power, and inequities between retirees will persist. For those reasons the parameters for calculating public pensions were always adjusted and modified.

From the analysis of the secondary data, selected from the national databases (INS, CNPP, MMPS, Eurostat), on the regulations of the European bodies, as well as of the scientific works that addressed the issue of sustainability and public pension system durability, we identified the way in which the state intervened in ensuring the sustainability and resilience of the public pension system.

The changes were made in stages, and the main method of intervention was found in parametric adjustments and changes (retirement ages, social contribution rates, contribution

periods). Strengthening the discipline in terms of labor expertise, broadening the taxable base for other categories of taxpayers, and increasing the penalties for early retirements were measures designed to ensure the resilience of the public pension system in Romania.

Discouraging early retirements, through higher penalties applied to pensions, was a measure that reduced pension enrollments by almost 40%, and the taxation of pension incomes, above the 2000 lei non-taxable ceiling, did not have remarkable effects on the social security budget neither on the disincentives to request the public pension. The method of mitigating inequities, by introducing the correction index, turned out to be an unfounded measure, because it did not have the expected effect, on the contrary, it deepened the inequities between pension beneficiaries with the same parametric elements.

From a regional point of view, by analyzing the ratio between employees and pensioners in the period 2000-2021, the differences are much more obvious, both in terms of support from employees and pension income. Regional differences were maintained and amplified by unit indexation of pensions, without taking into account the salary differences that were already present in the regions of the country. We paid particular attention in the research to budget subsidies, which intervened, in the form of transfers from the state budget, for the payment of pension rights, without which the commitments to pensioners could not be honored.

Following the analysis of gender inequities and representative indicators, we have identified a number of elements capable of generating discrepancies between women and men in retirement. Education level is one of the parameters that differentiate the professional and salary profile of employees both during professional activity and upon retirement. The analysis of the period 2000-2021, from the point of view of the level of education in Romania, revealed a slight decrease in school interest at all educational levels, more accentuated in the post-crisis period.

The lack of interest was also manifested in terms of continuing professional training, which was, and has remained, the lowest compared to the European average, a situation that limited the possibility of migrating from one job to another. And the wage differences, both in terms of gross and net wage earnings between women and men, were accentuated in Romania (18.4% in 2001), but thanks to social policies, they decreased considerably by 2020 (to 1.2% in 2020). In this sense, the transparency of incomes was considered the solution that could mitigate the wage gap, between genders.

Work intensity during the active period, type of employment contract, insured income, etc. are important factors in the assessment of salary incomes, capable of generating inequities in retirement as well. Remuneration for work was one of the reasons that amplified labor

migration, especially for the 15-24 age group, being the most vulnerable in terms of jobs and income. Women are the most affected in terms of work remuneration, job security, and work intensity and the gap in old age pensions, between women and men, increased from 30.2%, in 2011, to 33.44%, in the year 2020.

We also analyzed the migration of the labor force in the period 2000-2020 and by economic sectors, in order to highlight the migration flow, as well as between the residence environments (urban, rural).

And last but not least, the analysis of work and work remuneration focused on the analysis of the weight of people by types of employment contracts and by income tranches, in which the insured were assigned. The lack of available statistical data prevented us from analyzing the entire research period (2000-2021), which is why the conclusions of the analysis were quite limited.

*The economic and social dimension* of the research analysis results includes questions related to the identification of some causes of budget deficits, their effects, sustainability measures, and adequacy of the public pension system. I associated questions 2, 3, and 4 of the Interview Guide with this dimension, and they are supported in this study by analyzes of the dynamics of economic indicators: the share of pension expenses as a percentage of GDP, the level of the average gross and net salary in the economy, the rate annual average inflation, tax evasion, state social security budget subsidies. The opinion regarding alternative saving schemes (Pillar II and III) as potential sources of the budget deficit was not excluded from the analysis either (question 10). Respondents with more experience in the field of public pensions (over 16 years) perceive differently the effects of Romanian pension legislation in the more than twenty years of analysis. They believe that the deficit of the state social insurance budget is due to the decrease in the number of taxpayers (13 answers), external migration (6 answers), and low contributions to the social insurance budget (5 answers). These opinions are supported in the research by the analysis of the employee-pensioner ratio and by the statistical data that highlighted the lowest ratio in the year 2000 (0.76) and the highest ratio in the year 2021 (1.09). Another cause of the observed budget deficits refers to the nine categories of age reductions, due to working conditions and their expansion. Their magnitude has determined that the effective retirement ages, both for women and men, are the lowest in Romania, compared to European countries that implicitly determine lower accumulations to the state social insurance budget.

*The technical dimension* of the analysis of the research results includes questions related to the most important decisions that created inequities and discrepancies between pensioners

(question 6), legislative errors that increased the risk of poverty among the elderly (question 7), possibilities of income adequacy from pensions (question 8), or expressing opinions regarding the current parameters for calculating pensions (question 9).

The indicators analyzed in the research (the average number of pensioners, the number of employees, the average duration of professional life, the evolution of the beneficiaries of the guaranteed minimum allowance, the number of pensioners with full and incomplete years of contributions, the average old-age pension) they highlighted an accentuated dynamic of them. The increase in the number of pensioners in the period 1990-2000 was followed by considerable efforts to reduce them through various ways of demotivating retirement: by increasing the retirement age, increasing the contribution period, increasing penalties for early retirement, on part, but also of facilitations at the same time: through permissiveness of medical expertise, by extending age reductions due to working conditions, by increasing the increase granted to working conditions, etc. Thus, the ratio of employees and pensioners have been altered, implicitly the number of pensions, and the increase of retired people at risk of poverty due to the inadequacy of incomes.

*The structural dimension* of the research analysis results includes data related to the possibility of expanding Pillar II of pensions for all categories of taxpayers without an age limit (question 11), or the effort required to save for old age in Romania (question 12). Respondents were asked for their opinion on service allowances (question 13) as well as on the operation of a unitary system based on contribution. Considering the experience of the respondents, we requested opinions regarding the potential stages of reforming the public pension system in Romania (question 14) and legislative proposals in this regard (question 15).

These answers confirm the statistical indicators analyzed by present research and are supported by relevant statistical data: such as the expansion of the insurance categories that owe social insurance contributions, the increase in the social insurance contribution, the fluctuation of the pension replacement rate, the increase in the rate of dependence on the system, average net/gross pensions alteration for age limit, and so on.

The fundamental characteristic of the public pension system in Romania in the period 2000-2021 was flexibility, meaning by this the ability to shape and adapt to various economic, social, and political situations, without long-term strategies and policies. This flexibility has not always been auspicious. The response of decisional flexibility is projected today on the contributors to the system.

In Romania, the period 1990-2000 was the most overwhelming, both from an economic, structural, and decision-making point of view, and is therefore responsible for the errors and

excesses in the system. Altering the essence of the public pension system has led to frequent adjustments and corrections. Easing and facilitating retirements, of any kind, was the main channel for obtaining a category of income: early retirement with age reduction, for activities that fell within the working groups/conditions, disability retirement, was a way to enter among the pensioners, due to the medical permissiveness shown by the work expertise commissions. This resulted in artificially increasing beneficiaries and reducing retirement ages well below the standard ages for both women and men.

The two global crises (the one triggered at the end of 2007 and the Covid-19 crisis) amplified the problems of the public pension system so the legislation in the field was subjected to a long series of adjustments and corrections, due to the increase in pension expenses and the search for solutions for income adequacy. The push for pension income adequacy has also been influenced by increasing constraints on the gross domestic product, leading to long-term budget imbalances and budget deficits.

Because of the large number of human and financial resources involved, the attention of political decision-makers had to be much greater in substantiating public policies. The rigor of the legislation in opening pension rights, regardless of its category, had to be maximum. It is not possible to evaluate in terms of equality between a pension right and other categories of social benefits, under the coordination of the social protection system. If the latter allows modification/suspension, under certain material or financial conditions, tested, public pensions, once established, remain in payment until the beneficiary's status changes.

The study of specialized literature and specific legislation confirmed to us, in addition, the fact that the reforms of the public pension system, over the last twenty years, were contradictory. On one hand, they sought to limit access to a pension category by applying higher penalties to early retirements, by increasing the retirement age and the contribution period necessary to open the pension right, and on the other hand, they substantially modified access, by granting age reductions on account of working conditions.

The cyclicity of the reforms of the pension system in Romania, associated with the inefficient post-December economic mechanisms, had the ability to demonstrate that the issue of pensions remained a current topic, against the background of the dynamics of economic, social, and political factors, and the shortcomings of the system made the problem of public pensions to remain at the top of the political agenda even today, after more than 20 years. And in addition, pension reforms have become topics of political propaganda, as hot as they are populist, and indispensable in subsequent government programs, without generating coherent, applicable, and sustainable long-term policies.

The analysis of the twenty years, from the perspective of the resilience and vulnerabilities of the public pension system, correlated with the answers provided by the participants in the structured interview, highlights the fact that not all the recommendations of the European Union have been reflected in our pension policy. The conclusions we reached, supported by the answers of specialists in the field, reinforce our conviction that the public pension system in Romania is:

- Vulnerable from an organizational point of view;
- Dependent on the social protection system;
- Demographically sensitive;
- Territorial and gender inequitable;
- Inadequate and financially unsustainable;
- Dependent on the labor market;
- Low administrative capacity.

## **5. Main recommendations**

The financial sustainability measures of the public pension system in Romania must show a differentiated treatment compared to:

- Pensioners in payment who today benefit from a pension category;
- Future retirees.

Towards the beneficiaries in payment, we recommend a differentiated treatment of the analysis, invoking respect for their work, as "beneficiaries" of the frequent legislative changes, as follows:

- The functioning of a unitary system of legislated pensions;
- Eliminating legislative interference with the rights established as social protection measures and public pensions;
- Checking the accuracy of the current database and clarifying it by capitalizing on all incomes on which social contribution quotas have been applied;
- A differentiated treatment compared to pensioners in payment considering the fact that a significant share did not benefit from alternative savings schemes for private pensions, either because of age, because of salary, or because of the lack of organized forms of saving;
- The recalculation of pensions in payment, on unitary principles, and the elimination of inequities resulting from working conditions, from work groups, from increments, from equal contribution periods;

- Indexation of pensions with the inflation rate based on clear criteria and prior impact studies, able to highlight possible inequities and confer better predictability and viability of the system;
- Social protection measures provide financial independence and a decent standard of living.

Regarding the pension legislation for future retirees, our recommendations, correlated with those contained in the answers of the interviewed persons, are more and more specific, as follows:

- Identification of a unitary formula for calculating pensions for all professional categories;
- Elimination of the pension correction index;
- Establishing the value of the pension point at the value of 45% of the average gross salary in the economy;
- Correlation of calculation parameters with life expectancy;
- Stimulation of remaining in activity after fulfilling the retirement conditions for the age limit;
- Narrowing the conditions for early retirement;
- Encouraging participation in private pension funds by eliminating age requirements;
- Tightening of labor legislation, by establishing differentiated wages, by economic sectors and branches of activity;
- Eliminating the age reductions granted and respecting the standard retirement ages, both for women and men;
- Elimination of additional points for workgroups/conditions;
- Progressive taxation of salary income;
- Eliminating the taxation of pensions above a certain level, correlated with the average gross salary in the economy.

Ensuring an adequate and sustainable public pension system, through a legislative framework based on sound management, allows the guarantee of pensions that meet the requirements of efficiency and social security.



## **6. Future potential research**

Along with the experience and knowledge accumulated during the doctoral studies, this scientific approach represents a milestone in the realization of other relevant and interesting topics, identified during the research.

The need for financial security, to guarantee incomes for a large number of current pensioners, without alternatives to save during the active period, forces the operation of sustainable pension systems, and this guarantee is dependent on the knowledge of the existing problems and the efficiency of the intervention mechanisms. Synthesizing the information expressed in this research and knowing the dynamics of social policies and the factors with direct influence on public redistributive pension systems, we have identified the need for the operation of coherent, flexible regulations adapted to social policies.

Increasing the labor force potential, fiscal stability, collection of contributions, and effective salary policies represent mechanisms to stimulate the adequacy of incomes in general, and of pensions, implicitly. Wage transparency, as a measure to eliminate inequities between employees, should help eliminate wage discrepancies between professional categories and between genders. The promotion of a diverse set of measures within social policies constitutes a real and viable framework for guaranteeing public pensions.

The analysis regarding generically called special pensions, analyzed, and published in an article during doctoral studies, deserves further attention because, by their way of regulation, they generate collective frustrations and dissatisfaction among the beneficiaries of public pensions. Therefore, future research refers to the realization of an in-depth study of special pensions in Romania over a longer time horizon (after 1990, until today) and of their impact on the perception of the Romanian pension system.

Another possible research that we have in mind refers to the realization of a comparative study of the current pension systems of different EU member countries and the Romanian system, in order to identify possible solutions that contribute to solving the problems of gender inequities.

And last but not least, a better understanding of gender inequities, in the case of public pensions, can be gained by deepening the analysis started in Chapter V of this research, to identify possible solutions for elimination.

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