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## CONTENTS

|   |           |
|---|-----------|
| <b>BRUCE MALINA AND THE SOCIOLOGY OF READING ANCIENT<br/>CHRISTIAN TEXTS – ELEMENTS OF METHOD</b>   |           |
| Ionut MAVRICHI .....  | <b>7</b>  |
| <b>SOCIAL PERCEPTION ON INTERETHNIC AND INTERCULTURAL<br/>RELATIONSHIP</b>                          |           |
| Mihaela SANDU (NAIDIN), Maria PESCARU.....  | <b>17</b> |
| <b>DEMOGRAPHIC STRUCTURE OF THE ROMANIAN COMMUNITY IN<br/>SPAIN IN 2012</b>                         |           |
| Cristina ILIE.....  | <b>29</b> |
| <b>THE MESURAMENT OF WELFARE STATE</b>  |           |
| Ermelinda DURMISHI.....   | <b>34</b> |
| <b>IMPACT OF THE SOCIAL ECONOMIC CRISIS ON THE<br/>POPULATION’S PHYSICAL AND MENTAL HEALTH</b>      |           |
| Gabriela ILIE .....   | <b>63</b> |
| <b>THE CONSEQUENCES OF THE INTERNATIONAL MIGRATION<br/>UNDER THE CIRCUMSTANCES OF GLOBALIZATION</b> |           |
| Cristina Maria PESCARU.....   | <b>69</b> |
| <b>THE PROBLEMATIC INTEGRATION OF DISABLED PEOPLE IN THE<br/>LABOUR MARKET</b>                      |           |
| Alexandra DEACONU.....  | <b>77</b> |



## BRUCE MALINA AND THE SOCIOLOGY OF READING ANCIENT CHRISTIAN TEXTS – ELEMENTS OF METHOD

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**Abstract:** *The article proposes a methodological perspective for the sociology of religion based on Bruce Malina's contribution on the field, namely on issues concerning the study of ancient Christian texts. He is a notable researcher of early Christianity, characterised by the use of inferences and models derived from cultural anthropology. Malina's premises, identified in this article, start from sociolinguistic considerations, namely from the fact that meaning does not reside in the text, but in the social system that individuals come from. The access to the meaning of a text originating in foreign cultures or societies is conditioned by the knowledge or at least the approximation of those cultures. According to Malina, this is possible only through the use of models based on the socio-scientific inquiries of cultural anthropology, which can function as lenses for avoiding ethnocentrism or anachronism. They are mid-range models used for the particularised description of social aspects. They do not and cannot claim the deciphering of the social complexities of antique society, but in their own right they can indeed illuminate certain social aspects that are not accessible to us due to the chrono-social distance between the modern reader and the ancient text. In the first instance, Malina develops some methodological premises for the research of ancient Christian texts which usually set the position of The Context Group research standpoint.*

**Key words:** *sociology of religion, anachronic ethnocentrism, text, re-contextualization*

### 1. Social History, Sociology of Reading, Antiquity, Early Christianity

The act of reading is invariably socially conditioned. From the mere fact of deciphering the different signs of written language, to the usage of academic language, individuals are modelled by the society they live in. This conditioning is not only linked to cultural socialization, but it is an on-going process which lifelong accompanies the individual. Dulin (1974) claims that there are multiple social factors that predispose towards certain types of lecture even before taking the book into one's hand. During the lecture, the text is first understood according to one's subjectivity modelled by previous experiences, and after the lecture ended, the text itself can condition social behaviour "practicing Playboy philosophy" even "Cancan". Under the wide umbrella of the sociology of

reading, sociological studies have approached different topics trying to find patterns that predispose to certain types of lecture, and the lecture's significance. They researched the specific research interests of different social groups, classes, the social effects of reading etc. (Dulin, 1974 creates a diagram of these concerns in the Anglophone space). The topic is of course vast and approachable.

But this is not the case with the challenges that historical sociology encounters (Hill and Kruger, 2012). These challenges require a specific methodological approach that needs to depart from the premise that the studied ancient cultures, having in their surviving texts and archaeological artefacts the only connection with the socio-cultural environment that we live in (Hurtado, 2006), were radically different from our post industrialised and post-modern society.

Malina (2001<sup>3</sup>), in a now classical work of the socio-scientific bible criticism, starting from the premises of social science, anthropology, socio-linguistics, proposed a new method and approach of antique texts. The question is about the way we evaluate and approach these antique texts especially if the research field relates to the language and symbol codes of the history of religion. This approach requires specific methodologies. One such methodology was developed by Bruce Malina. He studied the way ancient Christian texts might be studied.

## **2. Bruce Malina and the socio-contextual model of Bible reading**

### *The lecture of an antique text*

The synthesis that follows is based on his theory regarding the lecture of an antique text and that was formulated in his article *Reading Theory Perspective* published several times (Malina 1996, Neyrey 1991) and that represent a sort of a programme for the socio-contextual syntheses produced by *The Context Group*<sup>1</sup>. Apart from the specified cases the references are made to that specific article.

Malina starts arguing from the hypothetical case of an American visitor of the Roman Palestine first century AD who, having a curiosity about the Egyptian imports, decides to go to Gaza. On his way he hears totally unknown words of a foreign language transcribed by Malina in the characters of Hebrew language, sounds as weird as the transcription. Asking somebody nearby „What did that mean?“ obviously the one answering does not understand and tries to explain, this time in ancient Greek. The confusion persisted.

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<sup>1</sup> *The Context Group* organised under this name a group of researchers that use in biblical studies socio-scientific methods from sociology and anthropology.

This situation represents for Malina the model for a modern reader trying to understand an ancient text, specifically biblical texts, for it requires the reader the same necessary procedure for understanding a total foreigner who is trying to communicate something in his own language. But, in the case of the New Testament texts, the foreigner is the reader himself. Not even the transliteration of the foreigner's message in Palestine, namely from the Greek signs to Latin signs would offer informative surplus.

Consequently, Malina asks if a vernacular translation could unveil the meaning of the message. 'He was led like a sheep to the slaughter and as a lamb before its shearer is silent, so he did not open his mouth. In his humiliation he was deprived of justice. Who can speak of his descendants? For his life was taken from the earth'. The text is a quote from Acts 8, 32-33, which in its own turn is citing Isaiah 53, 7-8 (LXX). The Acts' context gives us some more information. The first words spoken in Hebrew were said by a black person, probably Jewish (proselyte?), being in a pilgrimage to Jerusalem, an eunuch of Queen Candace of Ethiopia. The second person that offered explanations in Greek was Philip, a Christian deacon.

The question that follows is that if someone knew information about each one of us regarding the name, social role and status, our job or data on our chrono-spatial location, could that person that knew the entire above mentioned, claim that he totally understands us?

'Notice that these questions cover the who, what, when, where and how of the situation. They have not raised the why question, the question of meaning. (...) The answer to all these questions requires historical information of the who, what, when, and were sort. But to find out the why – what it means in the lives of the people – requires information from the social system of the time and place of the original audience.' (Malina, 1991 p. 5) This means that in the case of Malina's example we need to know information regarding the social system of first century east-Mediterranean world, which were transmitted through the Greek language (all the New Testament texts were written in Greek).

### **3. Text and significance**

The shared meaning resides in the shared social system assumed through socialization. 'The social system includes: (1) culture, i.e., the accepted ways of interpreting the world and everything in it; (2) social structures, e.g., the accepted ways of marrying, having children, working, governing, worshipping, and understanding God; and the accepted ways of being a person (including self-understanding). People use language to have an effect on others in terms of the meanings of the social system. And people learn those meanings along with the language of their society in the process of growing up.' (Malina, 1991 pp. 5-6)

The apparent squiggles (Hebrew and Greek) have certainly a sort of a logical matrix; they are by no means aleatory, and that is why learning to read is nothing less than learning to recognise the repetitive models from the squiggles. These models are in fact the words that discover the meaning on the exclusive condition of sharing the same social system with the author of the squiggles.

In this sense, Malina says, the theory of reading corrects the different types of errors and presuppositions of most readers, the most common one being the place where meaning resides – in the words or grammar constructions.

In order to specify precisely the place of meaning from socio-linguistic perspectives, Malina draws some ideas on language. ‘...meaning is not in the wordings. Rather meaning resides in the social system of individuals that is held together by shared culture, shared values, and shared meanings along with social institutions and social roles to realize those values and meanings’ (Malina 1991, p. 6). The purpose of language is the transmission of meaning and it is formed by the graphemes of sounds which, gathered together in certain patterns form words that express meaning. But the place of meaning is not in the words. They are only the conveyers. Meaning comes from the social system which at its own turn is formed by it. The expression levels of one language gradually grow from the graphemes that form words, to the words that together form sentences, and from here to phrases and complex texts. The interpretation of these latter ones, in order to be kept safe from the ethnocentric errors of the ‘immaculate perception’, needs information from the social context where the redaction took place.

#### **4. The risk of anachronic ethnocentrism**

Most of the times, the majority of readers do not make the effort to understand the necessity of paying attention to the set of values, norms, meanings which were taken for granted by ancient readers. They read ancient texts according to their own culture. In social interaction this process is called selective exposure and defines a tendency to select the messages of communication according to the personal baggage of experiences, knowledge, attitudes. The selective perception is the tendency to interpret the messages of communication in the terms of the personal attitudes and convictions. The principle is well formulated by Tomas Aquinas ‘*Quidquid recipitur per modum recipientis recipitur*’ – What is received is received in the way of the receiver Malina & Pilch (2006, p. 5).

At the origins of modern inclination toward the ethnocentric and anachronic interpretation of the Bible stand the heritage of illuminism and romanticism. Emphasising the objectivity of reality, illuminism, for the first time in historical writing, puts an emphasis on the fact-fiction distinction. The

immediate reaction to illuminism, a somehow arid approach, was romanticism (from the French name for a particular literary form – *le roman*). Romanticism emphasises the particularity and sensitivity of each human being, the whole life being seen like a developing novel. From here started the new interpretative approach of the Bible – a unitary story about human salvation. ‘the idea of the Bible as presenting a novel-like narrative, with character, motivation and plot is, like the modern novel itself, no older than the 18<sup>th</sup> century’ (Stephen Prickett in Malina & Pilch 2008, p.3)

The romantics continued the idea expressed by Aquinas inventing the concept of appropriation – the personal assimilation of ideas indifferent to the cultural provenance, what we would today call ‘contextualising’ or ‘enculturation’. The accent on what the original auditorium should of have understood is minimum, favouring the relevance for the contemporary reader.

The sense of nineteenth century historical writing was, according to Malina & Pilch (2008), radically different from our contemporary one. Today people consider themselves very different from people of the past. And from here we have the relative irrelevancy of historical identity, while the romantic and pre-romantic historiography saw people from the past and the contemporaries very similar in most matters. Therefore, the stories and models from the past were legitimate and relevant for the modern reader. The Bible was relevant in its own right, unmediated by the cultural values of the authors of the sacred texts. What was important was the personal way of vibrating during the lecture – subjective sentimentalism. ‘Whether in religion, literature, gardening or sexual relations, he stresses personal response over convention, private association over traditional typology, feeling over meaning.’ (Prickett in Malina & Pilch 2008, p. 4).

In this sense the dilemma proposed at the beginning of the article is explicable. For it describes the risk that each modern reader is exposed to when he wishes to read a text that does not originate in its own culture – ethnocentrism, the tendency to interpret texts originating in cultures different than our own through the optics of our own socialization and cultural experience. Words are indeed meaning bearers but only as tags. Their content can radically change in time. The word *Christ* has for the modern reader a radical different significance from what a first century Judaic diaspora individual would understand, for it was a precise identifiable social function corresponding to the Judaic concept of Messiah. Malina offers some other word examples which, from the significance point of view were radically different from the semantics that a modern reader might attribute to them (baptism, unction, blasphemy, apocalypse etc.). Ethnocentrism can affect the understanding of the social institutions of family, kinship, economy etc. The ideal would be the interpretation in a honest way to the intentionality of the author and the original audience.



## 5. Text in context

The dimensions of reading from a socio-linguistic point of view are according to Malina individual and social, intrapersonal and interpersonal. In order to illustrate the intrapersonal dimensions of the text and reading, and also the type of challenge that the deciphering of an antique text presupposes, Malina offers the example of the Nazareth event (Luke 4, 16-21)<sup>1</sup>. The adequate understanding of the social reality transmitted by the text taken as an example depends on socio-contextual determination of some important elements: the synagogal context of public lectures, the value and societal structures of first century Palestinian Judaism, the language of the lectures, the intellectual level of the auditorium, the role of biblical interpreters in socio-religious institutions etc.

None of the New Testament books does express realities outside their social contexts. All the inhabitants of that society lived in a world with the pivotal values of honour and shame, within the unfolding dynamics of patron-client relations, of the specificity of the roles etc. (Malina & Pilch, 2000)

Malina & Rohrbaugh (2003), Malina & Pilch (2006) speak about the existence of an unwritten part of a written text, that part of meaning implicit in the act of reading and which the author presupposes to be common to the reader and himself. In this sense the reading is an interaction between author and reader, a social act, in which the author sends the message and the reader deciphers it completing the read text with the shared baggage of meaning necessary to a full understanding. Meanings are incorporated in the shared social system that makes possible the act of reading. There are, though, cases in which the author and the reader are not part of the same social system. Therefore there is no possibility for the reader to fill the gaps of the text with the presupposed known meanings intended by the author (no author writes for readers outside his social system). These texts need further explanations.

The approach that we must have regarding biblical texts is the following 'WHO says WHAT to WHOM about WHAT, in WHAT setting, and for WHAT purpose?' (Malina, 1991 p. 18).

Malina referring to Edward Hall's research asserts that the central premise for the decryption of the meanings of any text is the identification of

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<sup>1</sup> He went to Nazareth, where he had been brought up, and on the Sabbath day he went into the synagogue, as was his custom. He stood up to read, and the scroll of the prophet Isaiah was handed to him. Unrolling it, he found the place where it is written: 'The Spirit of the Lord is on me, because he has anointed me to proclaim good news to the poor. He has sent me to proclaim freedom for the prisoners and recovery of sight for the blind, to set the oppressed free, to proclaim the year of the Lord's favor.' Then he rolled up the scroll, gave it back to the attendant and sat down. The eyes of everyone in the synagogue were fastened on him. He began by saying to them, "Today this scripture is fulfilled in your hearing."

the linguistic context type from which the text is taken. Hall (1976, 1983 in Malina 1991, p.19) differentiates two types: high and low contexts.

The society that produced the texts of the New Testament is a society which the anthropologists would categorize as being of high linguistic context (Malina & Rohrbaugh: 2003), societies for whom the act of conversation and redaction presupposes the shared knowledge of the common context of the expressed things. Nobody from antiquity would have felt the need to explain the father – daughter relationship because this relationship was socially codified and common to a wide group of people so that the written or verbal detailing of it would have been superfluous. Likewise, nobody from the first century Palestinian antiquity would have bothered to explain why in the parable of the sower, he throws the seed on the field before ploughing – it was taken for granted, while for the contemporary agricultural model this practice is not common. Therefore the writing was somehow impressionistic, sketchy, leaving much place to contextual understanding. In the same time, the codified assertions and stereotypes were a commonplace.

By contrast, the societies of low linguistic context like ours produce very specific and detailed documents. The readers of such societies expect that the authors offer texts very explicit both in content and context. On the one hand one of the reasons is the specialization of disciplines therefore the birth of a very technical vocabulary, and on the other hand the very diverse nature of human experiences in the modern world – their uniqueness demanding correspondent explanations (Malina & Pilch 2000). An American study from 2002 shows that 76% of the Americans believe that the reading of the Bible does not necessitate extra information for being understood, the authors having had taken care to mention all the elements needed for adequate understanding (as expected in low linguistic context societies, see Malina & Pilch, 2006).

The texts belonging to low linguistic context societies leave little space for interpretation, imagination, preferring to express in the most specific way author's intentionality.

## **6. Re-Contextualization**

Literary theory affirms that the lectured texts are 're-contextualized' by the reader as a result of the lecture in their personal environment (there is also the possibility of de-contextualizing a text – when the style, the grammar, the aesthetics are analysed). The Malina & Rohrbaugh (2003) thesis is: for the modern reader, the re-contextualization is not possible in the way the antique authors have intended because meaning derive from the social system. If the social systems of the author and the reader are the same, then communication is feasible. In a contrary case there is the need to access the social system of the originary audience. This access to antique social systems can be realised through

the use of socio-scientific models connected to the research of the circum-Mediterranean space.

These can be useful for their high abstraction degree, being thus different from the particularizing approach of historiography. In order to avoid ethnocentrism in the re-contextualizing process, some of the New Testament texts need to be analysed with precaution. It is the case of John's literature, for example, where the community is constituted as an anti-society presupposing thus a further contextual heightening. Therefore the adequate re-contextualization for the synoptics does not match the 'maverick gospel' of John (Kysar 1997 la Malina & Rohrbaugh, 1998 p.2). At least in the case of John, it is not only compulsory to keep in mind that it was written in a high context society like the antique Mediterranean one, but more than that, John, writing for an alternative group/society – his community, has in mind that this community has a higher context, his language thus including anti-language elements that are characteristic to anti-societies.

'Haviland and Clark (1974) have suggested that both the writer and the reader participate in a 'given-new contract.' Under the contract, the writer is constrained to be relevant (i.e., not to confuse the reader with extraneous information), to cooperate, and to consider what the reader knows or doesn't know. Thus the writer constructs his/her sentences so that the 'given' or antecedent information (what the reader is expected to know) and the 'new' information (what the author is adding to this knowledge) are clearly differentiated ... Research has shown that readers' comprehension is impaired when this contract is violated by putting 'new' information into the topic or 'given' position in a sentence' (Malina, 1991 p. 16)

This violation can no longer happen in the case of antique texts, and the identification of any sort of error of this kind can be done only through reference to the original audience of the text. On the other hand the modern reader needs to pay attention himself, to respect the terms of the contract namely the fact that the partners were part of the same socio-cultural system.

## **7. The Socio-contextual approach**

'Granted the need to be a considerate reader, the contemporary student of Luke-Acts will have to learn a set of scenarios comprised of scenes, schemes, or models of varying abstraction that are typical of the first-century eastern Mediterranean. In our own society, the scholarly articulation of such scenes, schemes and models has generally been the *métier* of social scientists. For this reason, it would seem that the social science approach to biblical interpretation is best suited to the task of reading the biblical books with a view to understanding the meanings communicated by their authors. This scenario

model of reading might be called the social context approach.’ (Malina, 1991 p. 16)

The model of reading scenarios is confirmed by the experimental psychology studies (Malina & Rohrbaugh 2003) which suggest that the reader understands the written text like a series of explicit or implicit mental images suggested by the author. These bring into the reader’s mind similar images from his own culture and experience. Based on these common images, the reader operates the content alterations suggested by the author. In this sense we can talk of a ‘contract’ between reader and author – the author proposes deciphering scenarios known by the reader and only starting from these he transmits the new information.

In this sense there are great difficulties in understanding the New Testament texts, for the authors presuppose the fact that the reader takes for granted socio-cultural aspects as limited common-good, the value system of honour and shame, the patron-client social relations etc. The modern reader must necessarily be an attentive reader, purposely trying to be guided by mental scenarios characteristic to the period in which the texts were written. That is why adequate reading can be realized only through the optics of socio-cultural scenarios. Only in this way we can understand, as Malina & Rohrbaugh (2003) humorously suggest, why didn’t the Holy Family book a room previous to their arrival in Bethlehem.

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## SOCIAL PERCEPTION ON INTERETHNIC AND INTERCULTURAL RELATIONSHIP

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**Abstract:** *Romania, after 1989, registering the path of a consolidated democracy, managed to be a factor of stability in a region where ethnic issues have sparked more conflict. Although ethno-cultural diversity exerts a global challenge to representative democracy, the Romanian model of interethnic relations is of particular significance. In Romania, there was an inter-ethnic peace that can serve as a model for the whole region where we are.*

*Now in the world, the main causes of tensions, even conflicts are ethnic differences. Proper understanding of the relations established between members of different ethnic groups is the first step in trying to dissolve tensions and ethnic conflicts.*

**Key words:** *interculturality, ethnic differences, identity*

### Introduction

Romania, after 1989, registering the path of a democracy is consolidated, managed to be a factor of stability in a region where ethnic issues have sparked more conflict. Although ethno-cultural diversity exerts a global challenge to representative democracy, the Romanian model of interethnic relations is of particular significance. In Romania, there was an inter-ethnic peace that can serve as a model for the whole region where we are.

Now in the world, the main causes of tensions, even conflicts are ethnic differences. Proper understanding of the relations established between members of different ethnic groups is the first step in trying to dissolve tensions and ethnic conflicts.

In the context of the creation of the common European ethnic conflict resolution is a goal that is a starting point for a real integration and harmonious coexistence.

Mutual knowledge of ethnic groups in their interaction favors the communication process. In the knowledge process involved ethnic cultural patterns, the system of symbols, specific languages, experiences and practices of each ethnic group. Perception and knowledge of ethnic issues takes institutionalized forms that the strongest influences come from the direction of their achievement and cultural factors of specific interaction (political,

economic, etc.) of ethno-organisation. Ethnic groups perceive, first, that "action center" political, economic, religious, cultural attitudes that generating entity, which may use positive or negative action, approving or disparaging, to acts that encourage or block communication. At the same time, ethnic groups made inter- acquaintance, respectively seeing themselves as entities with goals, aspirations, feelings and specific intent.

The identity of the peoples of the great human communities became the object of science research and ethnography, sociology, psychology, etc.. It should be mentioned that the interest and concerns of systematic moral portrait of the peoples had a difficult path in our time. The Romanian people, in particular ethnic groups belonging to this people, was one of the subject peoples of the proletarian dictatorship, which has claimed over a long enough period of study in this area.

Today we are witnessing a new revival of the ethnic studies. This is due not only to progress and spread of democracy, encouraging linguistic identities, but also some deeper theoretical perspectives on diversity ethnos seen as the opposite of uniformity that could bring world economic and techno-scientific globalism.

In the field of knowledge and depth of ethnic identity groups reveals important role of language as a social and cultural phenomenon. It should be kept under continual review that faculty that makes us understand the virtualities of the word, of language as a whole, providing the specifics and differences between ethnic groups. Linguistic differences join other distinctions: the culinary habits and clothing to support and defend the institutions of ethnic groups, the ways social relations between man and method of operation of settlements and industries, the ways in which they show their sensitivity aesthetic features to the creation of cults.

Ethnic groups, as the specific social organization, the more features become more pronounced, the stronger influence have their component elements (organizations and institutions) and through them, people. Differences between ethnic groups become apparent if we consider the organization and functioning of families, urban and rural communities on how to produce material goods or how to spend leisure time. Differences between ethnic groups does not end there. They are clear and that it investigates the ways in which group members analyze and interpret them.

Attitudes and behavioral reactions to their situation ethno organization and are specific ethnic group, they are part of their characteristics and provide clues about the status of ethnic groups at a time.

The governance arrangements are their own ethnic groups, the rules of internal organization, the statuses and roles of people through the ways in which sanctions are negative behaviors and encourage behaviors that may be favorable, with illustrations and pictures about them, they generate especially

from people involved in their operation, ethnic organizations cause people to behave as their members, to maintain consciousness and ethnic groups to preserve them.

In Romania, ethnic groups, in areas where they exist, live together in a geographic area rather than trying to divide. I mean, people gathered in certain areas (settlements, areas) to facilitate its survival rather than to rule later. The dichotomy of "space co-inhabitation" - "divided space" the population of Romania has opted for collective housing co-inhabitation or territory and not ethnocentric variant, separate ethnic housing.

Currently in Romania live, learn and work together as well as membership of several ethnic groups: Romanian, Hungarian, Saxon, Székely, Bulgarians, Armenians, Russians, Lipovan, Turks, Tatars, Roma, etc. Macedo., Each with its own cultural particularities, features known too little or even unknown to others. We can also talk about different religion, different social affiliation, or why not, different geographical affiliation. Each such group has usually their own culture which is then transmitted from generation to generation, and then defended whenever needed. It is true that very often conflicts occur fueled by cultural differences and ignorance of each other, with no intention even to understand otherness.

In the face of such realities there should not remain merely at the prospect multi culturalist or, worse, to adopt assimilation point of view, that the minority culture to be absorbed by the majority culture. Perspective is the best approach interculturalists which assumes that all cultures are equal with a focus on interactions between individuals, groups or subgroups. Interculturalists perspective values the cultural differences and exploits social conditions and facilitate mutual understanding and exchanges between different communities.

Recognized as the richest ethnic mosaic in Romania, Dobrogea interculturalism can be a model for other geographic regions of the country, as there are a networking model that could be taken up for replication in other regions where there is an inter-ethnic coexistence. Located between the Danube and Black Sea, Dobrogea offered the man, always rich and diverse living resources, attracting different human communities in these places.

In the book "The union of Dobrudja - 130 years," Prof. Cristiana Craciun Prof. George Zbughea Craciun as coordinators say: "The Danube-Black Sea territory, the Romanian population, direct descendant of the Daco-Romans, had a continuous existence and civilization own, marked by an obvious originality. To the vicissitudes of history, however, were stronger in Dobrogea, territory which was essentially a drainage corridor invaders and also a favorite for many theater wars, the more damaging because, most were totally alien Romanian interests. However, Romanians have resisted without a moment of discontinuity in the province, created the material and spiritual goods, has always maintained close



links with their brethren left the river and stood up each time, above all adversities of time. "(Zbughea, Craciun 2008, p.33).

In Dobrogea, at present, many ethnic groups coexist characterized by a common historical past with the Romanians, but also a prenațional existence. This existence is defined by traits related to biological differences, language, ancestral history, religion, traditions and customs.

Based on the consciousness of identity, members of a specific ethnic group built a community, evidenced by close ties between them and an easy isolation from others.

Ethnic features are learned and transmitted from generation to generation, while members of ethnic groups change their views in a meaningful way, affected the majority of which come into contact.

History of Romanians brought together, most often as a result of armed clashes, a number of different communities today population is depending on the region have adapted and historical events that led to their establishment.

In terms of communities in the south-east of Romania, it should be noted that, over time, to see how the most people associate the term "Dobrudja" labeled "beach". You might say that the overwhelming majority of tourists are attracted by this idea (possibly "delta"), "beach", "fun" than the knowledge of the region, local people, the history of this place, to visit cultural and historic objectives . Therefore, for many Romanian Dobrogea remains "an unknown in his own house."

In addition to regional identity over mediated such as Transylvania, Banat, Moldovans, Oltenia and Muntenia, dobrogens seem small and insignificant, they are talked less about, not a label attached to others and they do not even jokes, which reflects a certain containment Romanian in the collective mind (so much deeper, if we consider the importance of humor, the "jokes" the Romanian people's psychology), which gives the impression that the collective mentality, Dobrogea region remained an annex and not one in an integrated country . Linguistic level, we can not talk about a "speech from Dobrogea (with the exception of regional words, which was quite modest), although it confirmed the existence of peculiarities in speech.

## **1. Work objectives**

The research objectives were outlined based on the main theme, as follows:

- Highlighting the specific differences and common cultural characteristics of ethnic communities in Dobrogea (relations with other ethnic groups and their relationship with ethnic majority);
- To assess how participants perceived the relationship between ethnic groups that live in the same community.

## **2.Participants in the study**

To capture the dynamics of inter-ethnic relations have been applied to a total of 210 questionnaires. Thus, there were interviewed in equal measure, Romanian, Turks, Tartars, Gypsies, Russians/Lipovan, Armenians and Greeks (Figure 1). Selection of subjects within each ethnic group will be subjected to arbitrary (convenience samples) (persons arbitrarily chosen by the interviewer or the people who volunteer), the snowball method (selection of chain requires respondents to provide names of other respondents who are part of the population of interest) and the sampling rate which imposes quotas in elections employment (indicating the frequencies of individuals with certain characteristics), the operator being able to find people to meet quotas himself indicated - Average residence and biological gender).

## **3. Research Tools**

Regardless of the perspective, the methodology is a basic element of any approach that justifies the theoretical and practical research findings.

As stated S Chelcea. I. Margineanu "in social science methodology has two sides: cryptic analysis of research and formulation of proposals for improving this activity" (I. Mărginean, S. Chelcea, 1998, p. 35).

The methodology should corroborate with the sociology, to adapt to the object sought and not just a collection of methods taken for granted.

Exploratory research techniques were: questionnaire survey, interviews and non-directives

To conduct this research we built a questionnaire to "investigate the public perception of ethnic diversity and intercultural dialogue."

The questionnaire includes 28 themes that state out the current state of interethnic relations, public perception and acceptance among people of different ethnic groups of family or friends. It will also submit to forms of awareness necessary to produce some change in mindset and the situations that can lead to improved interethnic relations. The questionnaire is constructed from dichotomous choice questions (yes / no), type scales (yes / no / do not know) and the scale choice Libert in 3 to 5 points. To record the current data of the respondents (includes data on biological gender, ethnicity, marital situation, educational level) rating scale was used (for classification).

Research interview used in this research, is an ideal technique for this analysis, as "replies the seal bears the subculture of which subjects are interviewed, so they must always be interpreted in concrete social context in which the interview took place." (Chelcea, 2001 , p.269). In-depth interview, was chosen as it allows greater flexibility in the collection of information on the concepts analyzed.

#### **4. Data analysis and interpretation**

Research has captured important features of members of ethnic groups inhabiting the life that can not be played in full, but we will drill only a few of these results seem significant to us.

The respondents' answers, their positive assessment of results vis-à-vis the city they live in, saying that it is a model of understanding among different races, which is supported by the presence of other ethnicities in the circle of friends of the investigation.

**Table 1**

Asked what they think about minorities in the region where they live, they said they were helping each other (42.9%), ("people have become accustomed to each other, there is respect and no conflicts").

Living is also an attractive element of the diversity of traditions and customs, said 33.8% of respondents. However, there are negative attitudes, rejection and 18.6% stating that they do not disturb each other, even if sometimes there is problem of relating daily (3.8%) - "sometimes we are indifferent to his and everyone is sometimes we feel devalued). This attitude is expressed through answers like "each sees their own business" is marked by physical space in which to carry out social contacts.

A first finding of the research was that relations between different ethnic groups of collaboration, tolerance and mutual respect between Romanian, Turks, Tatars, Russians/ Lipovan, Armenians and Greeks, the opposite hovering Roma - the embodiment of all stereotypes negative and marginalization. Since the first interview respondents noted that a distance from Roma self identified taken largely as Turkish Gypsies (problems encountered in Babadag).

Asked about the opinion of local people, who appreciate the ethnic groups inhabiting more likes and dislikes, respondents' answers were grouped as follows: Romanians were labeled as part of a hardworking, affable, communicative, clean, and on the other hand, have received negative labels "*are not united and do not help us when we need*" - Roma Club members).

Turks and Tatars were given labels similar to the Romanians, but traditionalists ("*respect their traditions, habits are beautiful ... not as others*"), fair ("*do not steal do not steal ... sir ... how are the Roma*" - Romanian Club members). *Armenians* are decent, hardworking, wealthy, conceited but greedy ("*they would not help if needed ... we have no money, we are poor ...*" - Roma Club members). *Greeks* are honest, have beautiful habits, are educated, respectful.

*Russia / Lippovans* are hardworking ("*work hard and help when need*" - Romanian from the Circassian Slava ), respect their traditions ("*do not accept ethnic marriages, or prefer to have their owns ... although they have borrowed customs from-us*" - Romanian Slava Circassian).

The negative attributes have been received by Roma, who are labeled as thieves, lazy (not working, want everything for granted without work"), have no education and living in misery (" I gave them clothing from My kids have worn a long time and when they got dirty I saw them discarded in the trash. Since then I no longer gave them anything!" - Romanian Club members). Other references to refer to the Roma are "walk together and when the gang steals - Kogalniceanu novel," they will not work, but want to be helped ... let them go to work, who helps us?" - Greek Constanta).

All these features that enhance the fracture (economic, social and spatial) between Roma and other ethnic groups inhabiting in Dobrogea rift plus

a number of negative characteristics such as lower education level, high level of crime and family disruption and living below the line of poverty.

**Table 2**

| Social representations of... | Questions                                     |
|------------------------------|---|
| Economical capital           | Who are the richest people in the community?  |
|                              | Who are the poorest people in the community?? |
| Political capital            | Who has more political influence?             |
| Symbolic capital             | Who deserves more respect?                    |
| Cultural capital             | Who respects traditions the most?             |
| Social capital               | Who helps each others more?                   |

Regarding the various forms of capital held by members of ethnic groups surveyed, showed that the richest are considered to be the Romanians (50%), also being the ones who are perceived as having more political influence (70%) and enjoying are the more respect (59.5%). Rroma are perceived as the poorest (72.9) but recognized in the community through their unity (21%).

**Table 3**

Among the following groups in your area, generally speaking, that:

|               | Sunt mai bogați % | Sunt mai săraci % | Au mai multă influență politică % | Se bucură mai mult de respect % | Își respect mai bine tradițiile % | Se ajută cel mai mult între ei % |
|---------------|-------------------|-------------------|-----------------------------------|---------------------------------|-----------------------------------|----------------------------------|
| Români        | 50,0              | 12,9              | 70,0                              | 59,5                            | 29,5                              | 14,3                             |
| Turci         | 10,0              | 3,8               | 4,8                               | 4,3                             | 25,7                              | 11,4                             |
| Tătari        | 1,4               | 1,0               | 1,9                               | 2,4                             | 16,7                              | 5,2                              |
| Rromi         | 1,0               | 72,9              | 1,0                               | 1,9                             | 2,9                               | 21,0                             |
| Ruși/lipoveni | 2,9               | 3,3               |                                   | 2,4                             | 1,9                               | 18,1                             |
| Armeni        | 34,3              | 4,8               | 8,1                               | 24,9                            | 20,5                              |                                  |
| Greci         |                   |                   |                                   | 2,9                             | 2,4                               | 5,2                              |
| Ns/Nr         | 0,4               | 1,3               | 14,2                              |                                 | 0,2                               | 24,8                             |

In other words, we can say that the Romanians have the economic capital, political and symbolic, the Turks and Tatars maintained their cultural capital while Rroma have negative pole of economic capital.

Keeping a religious cult which belongs to every ethnic group by ethnic heritage is perceived differently depending on the respondents: 26.2% of respondents said that they agree with keeping religion but religious ceremony to be conducted in mother tongue, 13.8% are minorities agree to maintain religious worship but unless they build places of worship.

Most respondents (45.7%) said that I agree with keeping the religious cult that ethnic minorities are by inheritance but does not initiate the

conversion methods and only 5.2% of the members disagree with the preservation of religious worship they belong to ethnic inheritance

When asked "Do you think that certain physical aspects that differentiate members of ethnic categorization can contribute to their discriminatory?" Most responses were negative (56.19%), meaning that the physical aspects that differentiate members of ethnic groups can not be discriminated them as long as that person is properly integrated into society.

In more than one percent (35.24%), respondents' answers were affirmative, holding that the physical aspects contribute to discrimination against members of ethnic groups, but only if they are accompanied by undesirable behaviors and there are prejudices about physical appearance of the person (8.57%).

The most common ways to discriminate among common knowledge were considered to be the financial situation (55.2%), religion (32.86%) followed by a much smaller proportion of age and nationality, that is biological gender.

Romanian traditions are treasures that should not be forgotten or abandoned, or changed by bartering with other traditions imported from other countries. They are ours, we characterized them, they define us and we feel richer, more different than others.

In Romania, Dobrogea villages where they live, along with Romanian, Turks and Tartars, Gypsies, Armenians, Russians / Lipovan, Greeks and other ethnic groups, it is noted that preserving traditions is very important for the vast majority of them. Mixed marriages pose a problem in that it occurs here cultures and traditions that should be respected, by both partners (45.71%) or to follow the tradition and customs belonging to ethnic majority partner (28.1%) or

partner of other ethnicities (3.33%) ("respect the habits of her husband's religion ... I went ... and I baptized the baby

Man, during its evolution, has undergone various stages of social and economic configuration, its relations with various forms of nature were dressed as the exploitation of nature generate some form of social settlement and therefore a certain mental structure. Forced to live in inter-ethnic space, man had to organize their living space, thinking, language, work helping him on it.

Constraint for social compliance since the start of raising and educating children, it consists precisely of the effort to enforce child ways of seeing, feeling, acting in a way that he might not get if he had not led to them. Collective habit is transmitted from generation to generation through education, thus a stable and safe members of society.

Family membership also occupies an important place in the harmonization of interpersonal relations in a mixed family as the basis of communication, respect the customs and traditions may appear on children's psycho-social consequences resulting from a mixed marriage primarily on networking group play (37.3%) ("... do not play with my children that we are gypsies.. what if ?") and the assimilation of social norms (30%) (child is taught to respect the customs, traditions conventions and personality development follows a course through these milestones: beliefs, trends, practices, taken as a whole group).

### **Conclusion**

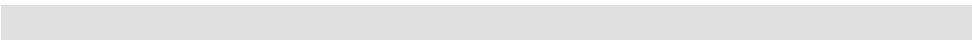
Perception of the participants to the research about the relationship between members of ethnic groups that live in the territory of Dobrudja, is positive, meaning that it likes each other and at the same time do not disturb each other. Also, the presence of ethnic minorities can be considered as a major contribution to the communities through the diversity and specificity of occupations, but also by traditions and habits that promote them.

The cause of all antisocial behaviors (especially seen in ethnic Roma) is the lack of necessary resources to ensure a decent living but also the existence of certain personality traits are represented in the collective mentality through negative stereotypes.

Imposed change on our society creates natural conflicts between traditional and new models. Old attitudes are changing slowly or partially, and new attitudes are acquired, sometimes rapidly, but not necessarily in positive terms. It would mean, at any hierarchical level, instantaneous assimilation of new models - agreed - but it happens often in an unsatisfactory rate of acceptance and new sedimentation.



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## DEMOGRAPHIC STRUCTURE OF THE ROMANIAN COMMUNITY IN SPAIN IN 2012

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**Abstract:** *The Romanian community had the highest proportion of foreign citizens in Spain on March 31<sup>st</sup> 2012, i.e. 903,964 Romanian immigrants, that is why, it has become a very present and interesting topic both for the Spanish State and the Romanian one. In order to make a full analysis of this community it is absolutely necessary to know the demographic structure of the Romanian community in the Iberian state. In this context, this article presents us the demographic structure of our countrymen's community in 2012 in Spain, detailing their number in every major city and region of the host country showing the structure of the Romanian immigrants by gender and age.*

**Key words:** *Demographic structure, Spain, Romanian immigrants*

### 1. Geographic distribution, structure and density of the Romanian community on the Spanish state territory in the year 2012

The Romanian community in Spain is a strong, active one, well - integrated in the Spanish society, playing an important role in the economic development of the host country, but also the Romanian economy (through remittances sent in the country).

In recent years, due to the economic recession, the flow of Romanian immigrants has decreased, yet however, the Romanian community has the largest proportion of foreign citizens in Spain (903,964 Romanian on March 31<sup>st</sup> 2012).

Precisely for these reasons, the large number of our countrymen on the Iberian State territory and its intense and varied activity, the two states, the Spanish and the Romanian, have become extremely interested in the subject of Romanian immigrants in Spain. In order to make a full analysis of this community it is absolutely necessary to know the demographic structure of the Romanian community in the Iberian state.

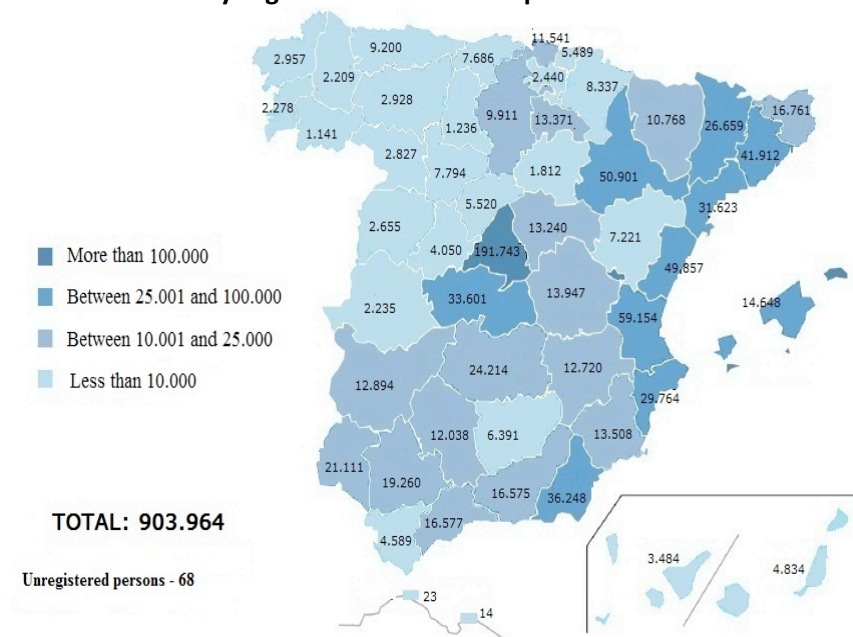
In Table number 1, we can see the distribution of Romanian immigrants by region of residence in Spain on March 31<sup>st</sup> 2012.

**Table no. 1 - Distribution of Romanian immigrants by region of residence in Spain**

| AUTONOMOUS COMMUNITY /REGIONS  | Number of Romanian immigrants | AUTONOMOUS COMMUNITIES / REGIONS         | Number of Romanian immigrants |
|--------------------------------|-------------------------------|--|-------------------------------|
| <b>Andalusia</b>               | <b>132,789</b>                | <b>Castile and León</b>                  | <b>38,733</b>                 |
| Almeria                        | 36,248                        | Ávila                                    | 4,050                         |
| Cádiz                          | 4,589                         | Burgos                                   | 9,911                         |
| Córdoba                        | 12,038                        | León                                     | 2,928                         |
| Granada                        | 16,575                        | Palencia                                 | 1,236                         |
| Huelva                         | 21,111                        | Salamanca                                | 2,655                         |
| Jaen                           | 6,391                         | Segovia                                  | 5,520                         |
| Malaga                         | 16,577                        | Soria                                    | 1,812                         |
| Seville                        | 19,260                        | Valladolid                               | 7,794                         |
| <b>Aragón</b>                  | <b>68,890</b>                 | Zamora                                   | 2,827                         |
| Huesca                         | 10,768                        | <b>Castile-La Mancha</b>                 | <b>97,722</b>                 |
| Teruel                         | 7,221                         | Albacete                                 | 12,720                        |
| Zaragoza                       | 50,901                        | Ciudad Real                              | 24,214                        |
| <b>Asturias (Principality)</b> | <b>9,200</b>                  | Cuenca                                   | 13,947                        |
| <b>Balearic (Islands)</b>      | <b>14,648</b>                 | Guadalajara                              | 13,240                        |
| <b>Canarias</b>                | <b>8,318</b>                  | Toledo                                   | 33,601                        |
| Palmas                         | 4,834                         | <b>Valencian Community</b>               | <b>138,775</b>                |
| Sta. Cruz de Tenerife          | 3,484                         | Alicante/Alacant                         | 29,764                        |
| <b>Cantabria</b>               | <b>7,686</b>                  | Castellón/Castelló                       | 49,857                        |
| <b>Catalonia</b>               | <b>116,955</b>                | Valencia/València                        | 59,154                        |
| Barcelona                      | 41,912                        | <b>Madrid (Autonomous community of)</b>  | <b>191,743</b>                |
| Girona                         | 16,761                        | <b>Murcia (Region)</b>                   | <b>13,508</b>                 |
| Lleida                         | 26,659                        | <b>Navarra (Community of)</b>            | <b>8,337</b>                  |
| Tarragona                      | 31,623                        | <b>Basque Country</b>                    | <b>19,470</b>                 |
| <b>Extremadura</b>             | <b>15,129</b>                 | Alava                                    | 2,440                         |
| Badajoz                        | 12,894                        | Guipuzcoa                                | 11,541                        |
| Caceres                        | 2,235                         | Vizcaya                                  | 5,489                         |
| <b>Galicia</b>                 | <b>8,585</b>                  | <b>Rioja</b>                             | <b>13,371</b>                 |
| Coruña (A)                     | 2,957                         | <b>Ceuta (Autonomous city)</b>           | <b>23</b>                     |
| Lugo                           | 2,209                         | <b>Melilla (Autonomous city)</b>         | <b>14</b>                     |
| Ourense                        | 1,141                         | <b>People without identity documents</b> | <b>68</b>                     |
| Pontevedra                     | 2,278                         |  |                               |
| <b>TOTAL</b>                   |                               | <b>903,964</b>                           |                               |

Source: The Report Foreigners residing in Spain. March 31<sup>st</sup> 2012. The main results, issued by the Government of Spain, Ministry of Labor and Immigration and the Permanent Immigration Observatory, Spain.

**Cartogram no. 1 - Map with the distribution of Romanian immigrants by region of residence in Spain**



Analyzing the distribution of Romanian immigrants in Spain by the autonomous communities in which they live, it is noted that the first place is occupied by the Community of Madrid with 191,743 Romanians, followed closely by the Valencian Community with 138,775, by Andalusia with 132,789 and Catalonia with 116,955 Romanian immigrants.

## 2. Composition of the Romanian community in Spain by age and gender

A detailed image of the age and gender structure of the Romanian immigrants in the year 2011 is given to us by the data from the National Statistics Institute of Spain (Table no. 2).

**Table no. 2 - Structure of Romanian immigrants residing in Spain by gender and age - 2011**

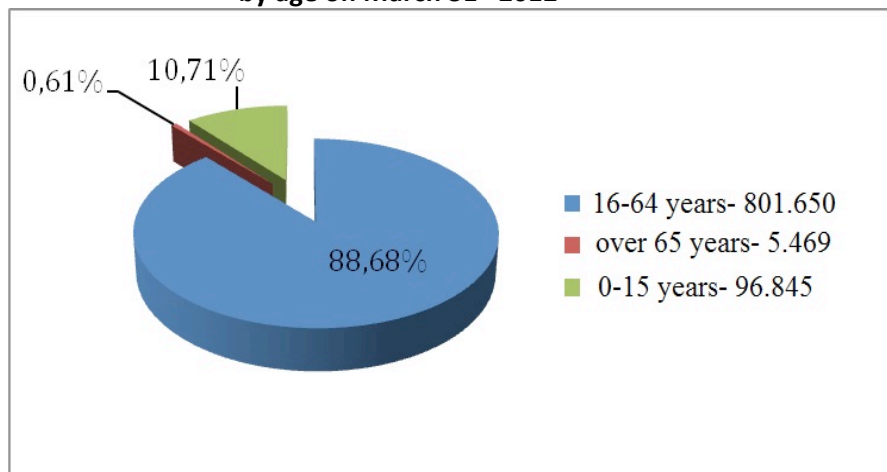
| Age                        | Both Sexes | Men     | Women   |
|----------------------------|------------|---------|---------|
| <b>Total</b>               | 865,707    | 451,098 | 414,609 |
| <b>From 0 to 4 years</b>   | 52,782     | 27,114  | 25,668  |
| <b>From 5 to 9 years</b>   | 42,836     | 21,924  | 20,912  |
| <b>From 10 to 14 years</b> | 37,094     | 19,043  | 18,051  |
| <b>From 15 to 19 years</b> | 36,940     | 18,344  | 18,596  |
| <b>From 20 to 24 years</b> | 102,929    | 48,745  | 54,184  |
| <b>From 25 to 29 years</b> | 134,323    | 67,567  | 66,756  |
| <b>From 30 to 34 years</b> | 140,563    | 77,772  | 62,791  |
| <b>From 35 to 39 years</b> | 106,482    | 60,451  | 46,031  |
| <b>From 40 to 44 years</b> | 87,021     | 47,307  | 39,714  |
| <b>From 45 to 49 years</b> | 46,578     | 24,422  | 22,156  |
| <b>From 50 to 54 years</b> | 39,360     | 20,371  | 18,989  |
| <b>From 55 to 59 years</b> | 22,637     | 11,414  | 11,223  |
| <b>From 60 to 64 years</b> | 9491       | 4303    | 5188    |
| <b>From 65 to 69 years</b> | 3451       | 1306    | 2145    |
| <b>From 70 to 74 years</b> | 1934       | 647     | 1287    |
| <b>From 75 to 79 years</b> | 849        | 234     | 615     |
| <b>From 80 to 84 years</b> | 318        | 104     | 214     |
| <b>From 85 to 89 years</b> | 93         | 25      | 68      |
| <b>From 90 to 94 years</b> | 21         | 4       | 17      |
| <b>From 95 to 99 years</b> | 4          | 1       | 3       |
| <b>Over 100</b>            | 1          | 0       | 1       |

*Source: Data collected from the National Statistics Institute of Spain.*

Studying the data issued on March 31<sup>st</sup> 2012 by the Government of Spain, Ministry of Labor and Immigration, in collaboration with the Permanent Immigration Observatory, in terms of the average age of the Romanian immigrants residing in Spain, we will see that it is 32.5 years. Detailing, we will find that out of the total 903,964 Romanians, only 96,845 people, that is 10.71 % are up to 15 years and only 5469 are over 65. The remaining 801,650 people, that is 88.68 % have ages between 16 and 64 years (Illustration number 1).

If we examine the structure of the Romanian immigrant community by gender, we find that the number of men is higher than the number of women. There are 484,736 men and 419,228 women.

**Illustration no. 1 - Structure of Romanian immigrants residing in Spain by age on March 31<sup>st</sup> 2012**



Source: *The Report Foreigners residing in Spain. March 31<sup>st</sup> 2012. Main results*, issued by the Government of Spain, Ministry of Labor and Immigration and the Permanent Immigration Observatory, Spain, table C2.

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## THE MESURAMENT OF WELFARE STATE

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**Abstract:** *The research about the welfare state is not new; it is very analyzed by different authors. The measurement of welfare state is a very important analysis, that means the study of welfare by statistical dates, but the question is “what data we need to calculate measures and how to obtain it?” By this measurement we can understand which are the statistical data and indicators that make a welfare state to be more successful and social. In this essay I with try to analyze the Albanian welfare state by the expenditure analysis on social policies. As we know the welfare states embrace distinct redistributive principles of expenditures, some of which may promote more equality of outcomes or of opportunities, while others may actually work in the opposite direction, in the case of Albania the redistributive principle is poverty reduction by support, solidarity, social justice and equal opportunities, to create a strong welfare state. Albania. But should be noted the fact that very difficult to analyze the welfare in Albania by social statistics because there are still weak. Nevertheless this I will try to do an objective analyze of these data and to give a realistic idea about the welfare state in Albania.*

**Keywords:** *dependent variable, measurements of welfare indicators, welfare state*

### Introduction

Within social science the notion of welfare states as a topic for comparative research is not new. In fact, it was the emergence and subsequent expansion of social protection until the 1970s which stimulated a large number of investigations into the causes as Peter Flora has done for the growth of welfare state, as the Esping-Andersen classification of the processes of cross-national variation. In this period of 1970s and 1980s most social scientists were studying the *economic context, social configurations and political coalitions and institutions*, which had enabled the massive expansion of the welfare state in the 20th century, nowadays they are investigating how governments are able to “impose losses” without losing political power.

This lack of progress in the description and explanation of welfare state change across countries and time is, we argue, at least to a considerable extent due to a “dependent variable” problem, which is relevant for comparative accounts of welfare state change, not only in terms of basic methodological or

technical problems but also in terms of substantive and theoretical aspects within this field of study (Clasen, Siegel, 2007, p. 5).

Over the last decade a growing number of authors have argued that the comparative analysis of the welfare state should be disaggregated to investigations into the dynamics of particular policy domains in order to be able to better capture variation both: *in terms of policy outcome*, as Evelyn Huber and John D. Stephens argue, as well *as processes of reform*, as Maurizio Ferreira, Martin Rhodes and Paul Pierson address in their researches.

### **1. The measurement of welfare state**

More broadly defined, the “welfare state” can be conceptualized as all mechanisms which provide social protection against and redistribution of market mechanisms and outcomes. Hence the welfare state not only comprises transfers and services, but also tax expenditures, minimum wages, state regulation of labor and product markets, state recognition of collective bargaining and other interventions. According Giuliano Bonoli the decision in favor of a broader or a narrower boundary of the term “welfare state” is not merely a matter of perspective. It also determines the level of analytical abstraction and thus influences whether or not the explanatory power of different theories of the welfare state can be assessed against each other. To put it differently both the choice of analytical perspectives and of empirical indicators is shaped by (meta) theoretical considerations and they affect central issues of descriptive and analytical inferences in comparative welfare state research (Ibidem, p.6-7).

Francis G. Castles and Herbert Obinger have improved more comprehensive data sources, the first one disaggregated data at the level of individual social policy programmes, and the second one more sophisticated statistical techniques, which have contributed to the continuous popularity of *social spending* as a central parameter of studies of change or stability within, and convergence or divergence across, welfare states (Ibidem, p.7). The expenditure analysis in comparative welfare state research is made by many other authors:

- Nico A. Siegel presents a general discussion of the use of expenditure data, illustrating the strengths and importance as well as problems of comparative inquiries which mainly (and sometimes exclusively) describe and analyze welfare state change in the light of *levels of social spending*.

- Johan De Deken and Bernhard Kittel focus on more specific problems. They *compare the quality of spending data* provided by major international agencies such as the OECD or EUROSTAT. Since definitions of national social policy programmes differ across countries and time, researchers face severe problems when comparing expenditure dynamics.



- The comparative analysis of social expenditure and particularly its relationship to other indicators, such as *welfare state generosity as an expression of "social rights"*, and *levels of "structural need" which reflect demographic and other socio-economic factors* (Ibidem, p.8 ).

➤As Olli Kangas and Joakim Palme demonstrate that the levels and changes of social expenditure are affected by two major factors: the generosity of social rights, which are expressed as entitlement conditions (benefit level and duration) and, often ignored, eligibility conditions.

➤Lyle Scruggs has developed a new method and data source for quantitative measures of welfare state generosity. His innovative data set combines measures of several dimensions of welfare state "generosity".

➤Jochen Clasen and Daniel Clegg point out that many current reform initiatives are about the management and reallocation of risks across different social groups and between the public and the private sphere.

➤Jon Kvist employs empirical indicators of "generosity", as well as two dimensions of conditionality, i.e. the "accessibility" of transfer payments and the obligations imposed on benefit claimants (Ibidem, p.9).

While Gøsta Esping-Andersen offers a critique of aggregate social spending as a measure for comparing the size and success of welfare states. His argument is that "by scoring welfare states on spending, we assume that all spending counts equally", and that this is manifestly not the case in respect of the items together constituting total public social expenditure.

However, even in the *poverty and social exclusion* research that has been such an important part of Stephan Leibfried's contribution to social policy scholarship, the underlying conception is the simpler and more traditional one of alleviating poverty and inequality, a similar argument remains appropriate. Expenditures favoring the privileged and the middle classes do not have the same welfare-conferring status as those favoring the poor and the underprivileged. Here, expenditures on social assistance and on unemployment benefits do, indeed, count for more than spending on benefits for the already comfortably situated. However, that only underlines precisely the same point: that, in measuring what welfare states do, aggregate "expenditure is not enough", argue Francis G. Castles, because not all spending counts the same.

Esping-Andersen's solution to the problem of the incommensurability of different types of welfare spending is to measure the *size and success* of welfare states by a different yardstick: namely, the extents to which welfare state benefits provide "*de-commodified*" social rights of citizenship. In effect, this type of measurement in, not of the size of aggregate state spending, but of *the eligibility criteria by which individuals qualify as beneficiaries of the welfare state and the generosity with which these individuals are treated*. Of these, the manner of provision is the more important. Esping-Andersen's three worlds of welfare capitalism are essentially (Castels, p.47-48):

- *a liberal world of means-testing* - Needs-tests and typically meager benefits, however, serve to curtail the de-commodifying effect. Thus, in nations where this model is dominant (mainly in the Anglo-Saxon countries), the result is actually to strengthen the market since all but those who fail in the market will be encouraged to contract private-sector welfare (Esping-Andersen, p. 16-17).

- *a conservative world of status-preserving social insurance* (Castels, 2008, p. 47-48) - A second dominant model espouses compulsory state social insurance with fairly strong entitlements. But again, this may not automatically secure substantial de-commodification, since this hinges very much on the fabric of eligibility and benefit rules. Germany was the pioneer of social insurance, but over most of the century can hardly be said to have brought about much in the way of de-commodification through its social programs. Benefits have depended almost entirely on contributions, and thus on work and employment. In other words, it is not the mere presence of a social right, but the corresponding rules and preconditions, which dictate the extent to which welfare programs offer genuine alternatives to market dependence (Esping-Andersen, p. 16-17).

- *a social democratic world of universalism* - The third dominant model of welfare, namely the Beveridge-type citizens' benefit, may, at first glance, appear the most de-commodifying. It offers a basic, equal benefit to all, irrespective of prior earnings, contributions, or performance. It may indeed be a more solidaristic system, but not necessarily de-commodifying, since only rarely have such schemes been able to offer benefits of such a standard that they provide recipients with a genuine option to working (Castles, 2008, p. 47-48).

But an extensive, and on-going, debate has surrounded Esping-Andersen's analysis of welfare state de-commodification and the resulting TWW typology. Firstly about the *theoretical aspects of the analysis as numerous critiques exist about the range of countries and regimes; secondly the absence of gender in the typology; thirdly the analytical focus on cash benefits; and at the end the creation of regimes that generalize about all forms of social policy provision from this base*. However, the debate has also exposed the limitations of Esping-Andersen's methodology, particularly in respect to the de-commodification indexes. This led to the utilization of more statistically robust methodologies (most notably cluster analysis), the results of which challenged the empirical accuracy of the three-fold typology by identifying four or five different types of welfare state (Bambra, 2006, p. 78).

The most prominent concept within the comparative social policy analysis in recent years has become "Retrenchment", as macro conceptualizations of the nature of change within modern welfare states (Clasen, Siegel, 2007, p. 11). Because it taxes and spends, the welfare state is by definition redistributive, but this does not automatically entail that it creates more equality. In order to assess how welfare states redistribute it is useful to

distinguish between horizontal, vertical and between-group redistribution according J. Hill, as bellow:

- Horizontal redistribution, seeking to reallocate income across the life cycle;
- Vertical redistribution is given by the progressivity of the tax system, and by the degree to which social expenditures go disproportionately to the least well-off;
- Inter-group redistribution is family benefits (transfers from the childless to those with children) and national health care (which implicitly redistributes between the healthy and the ill) (Esping-Andersen, Myles).

Welfare states embrace distinct redistributive principles, some of which may promote more equality of outcomes or of opportunities, while others may actually work in the opposite direction. (Idem)

The measurement of welfare state redistribution faces severe obstacles, both in terms of getting the right data and in terms of methodology. The early attempts to compare across countries were severely hampered by the incomparability of national income data. This all changed thanks to the efforts of the Luxembourg Income Study (LIS) and later also the OECD, to harmonize national income surveys (Mitchell, 1991; Atkinson et.al., 1995; Forster, 2000).

➤ *The methodological obstacles are no less severe.*

1. A first consideration has to do with *how we measure distributions*. Under the assumption that members of a household pool their income, the logical unit to study is the household. In the literature we find three prevailing approaches:

- a summary measure, such as the Gini coefficient;
- a deapproach where inequalities are captured via ratios (such as the top-to-bottom income decile);
- a poverty-rate approach.

It is broadly recognized that income alone may not give us an adequate picture of well-being and many researcher as Bobbie Erikson, Christina Aaberg, Barry Nolan and Patrick Whelan, argue therefore in favor of a more comprehensive, multi-dimensional measure of living conditions and household resources. This, however, creates greater obstacles for obtaining internationally comparable data.

2. A second issue is *where to draw the line*. We cannot compare income distributions before and after the advent of the welfare state. One can examine how changes in policy (say, a pension reform) influenced the income distribution but then, of course, we are not measuring total welfare state effects. Almost all research seeks therefore recourse to year-specific cross-national comparisons. The measurement of welfare state redistribution faces severe obstacles, both in terms of getting the right data and in terms of methodology.

➤ *A second methodological challenge lies in the difficulty of distinguishing between flux and stability.*

Cross sectional data confound the two and this means that short-lived, transitory low (or high) income is given the same importance as persistent levels. This problem is most acute in studies that focus on poverty. Studies that use permanent income, averaged over 5 or more years, find substantially less inequality than those that measure just one year.

➤ *The final and surely most intractable methodological problem has to do with the inherent endogeneity between primary incomes and the welfare state.*

Some studies of different researchers, as Esping-Andersen, suggest that welfare state efforts to equalize opportunities, reconcile motherhood and careers, maximize employment or homogenize early childhood development have decisive effects on equalizing lifetime earnings and career prospects and on reducing poverty. These may in fact overshadow the role of direct redistribution via taxes and income transfers. But on this front, empirical research has made very little progress, basically because the counterfactual is virtually impossible to define.

The distortion is obviously greatest when we measure redistribution across the entire population. By focusing on particular population or age segments, we can control for some of the bias. To avoid the massive zero-earner retiree effect one might, for example, confine the study to households with heads in the active ages or even more narrowly defined population segments. An alternative, but rarely used, approach is to use micro-simulation techniques to test for the counterfactuals (Esping-Andersen, John Myles)

Lately appeared many other concepts aimed at capturing the nature of at times different types of welfare state change as: “re-commodification”, “cost containment”, “recalibration” according Paul Pierson, “individualization” and “de-familialization”<sup>1</sup> according Ilona Ostner and Sigrid Leintner, or “residualisation”, “convergence” and “divergence”<sup>2</sup> according Martin Powell, “path dependence” (Clasen, Siegel, 2007, p. 11).

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<sup>1</sup>The concept of “de-familization” has gained a prominent position in contemporary analyses of welfare state change not least as a response to the concept of Esping-Andersen concept “de-commodification”, which has been criticized as unduly focusing on the (expansion or retrenchment) of social rights arising from (male) paid work in the labor market, thereby ignoring the “familization” of care work, which is largely done by women.

<sup>2</sup>However, whereas the question of convergence or divergence in the 1960s figured most prominently in comparisons of economic systems (capitalism vs socialism) and was linked to the so-called “end of ideology debate”, in the 1980s and 1990s the convergence-divergence question was raised in a different context and closely coupled to the study of globalization, or more generally, economic and political de-nationalization. As Julia O’Connor’s says, the concept of convergence is related to general issues of globalization and Europeanization.

For the analyses of relationship between social spending effort and poverty there are some databases in use as bellow:

1. *OECD* databases:
  - Social Indicators from Society at a Glance
  - Health data
  - Labour Market Programmes
  - Education database and Education at a Glance
2. *Europe*: Eurostat Esspros database on social protection
3. *Asia*: ADB Social Protection Index
4. *Worldwide*:
  - ILO Social Security Inquiry
  - World Bank: Safety Net Spending

The elaboration of these databases is made by the schemes, detailed descriptions of the benefits and information on recent changes and reforms concerning the social protection system of each country, which is defined as a distinct body of rules, supported by one or more institutional units, governing the provision of social protection benefits and their financing.

1. The OECD Social Expenditure Database (SOCX) has been developed in order to serve a growing need for indicators of social policy. It includes reliable and internationally comparable statistics on public and (mandatory and voluntary) private social expenditure at programme level (<http://www.oecd.org>)

The earliest iteration of SOCX distinguished between some 13 programme-based categories of social spending; the latest distinguishes between nine: *old-age, survivors, incapacity-related, health, family, active labor market (ALMP), unemployment, housing and other social policy areas (largely social assistance spending)*.

However, utilizing data now available on whether programme spending takes the form of cash payments or services, this latest iteration of SOCX identifies types of spending according to whether they fall into one of four broad policy areas:

- *Age-related cash* (combining old-age and survivors' pensions);
  - *Working-age cash* (comprising income support payments in respect of incapacity, unemployment, families and social assistance);
- *Health* (much the largest category of social services expenditure); and
- *Other service expenditure* (comprising all social services other than health) (Castels, 2008, p. 47-48).

2. In case of Europe the database on social protection is EUROSTAT ESSPROS that in their content have:

- ***The expenditure of social protection*** that is classified by type indicating the nature of, or the reason for, the expenditure: *social protection benefits, administration costs, transfers to other schemes and other expenditure*.

- **The receipts of social protection schemes** are classified by *type* and *origin*.

- The type gives the nature of, or the reason for a payment: *social contributions, general government contributions, transfers from other schemes and other receipts*;

- The origin specifies the institutional sector from which the payment is received: *all resident institutional units* (Corporations, General government, households, Non-profit institutions serving households) and Rest of the world.

- **Social protection benefits** are transfers to households, in *cash* or in *kind*, intended to relieve them from the financial burden of a number of *risks* or *needs*. The risks or needs of social protection included in ESSPROS are disability, sickness/health care, old age, survivors, family/children, unemployment, housing and social exclusion not elsewhere classified (<http://epp.eurostat.ec.europa.eu>).

## 2. Case study: The measurement of Albania welfare state, 2000-2012

Albania is often treated as a one of most difficult cases of the democratization, or an outlier compared to the other post-communist countries that have experienced regime change. The long, difficult, interrupted, and at times chaotic and certainly ambiguous path to democracy and a market economy however has firmly put the country beyond its initial post-communist ratings in democratic and economic progress.

The country's historical "deficit" including little to no experience with independent statehood, a lack of democratic experience, socio-economic underdevelopment, a deeply divided elite and the prevalence of authoritarian leadership, is often mentioned when explaining Albania's difficult transition path and its current problems as weak steering capabilities, inefficient use of resources and divisive politics have further undermined the fragile achievements of its democratic transition (Stiftung, 2012, p.2-3).

Citizenship and state identity in Albania is not a divisive issue. There is a wide social consensus on who is entitled the right of citizenship and what this right entails, with a majority acknowledging the state's constitutional makeup. All citizens enjoy the same rights; this is facilitated by the homogeneity of Albanian society, where people of Albanian background make up more than 90% of the population. Minorities enjoy broad cultural rights, which are monitored by neighboring countries. The Albanian state operates free of any religious dogma, while radical interpretations of religious ideas have found no traction in Albania's post-communist environment (Idem).

Looking at the reforms pattern of the last decade we may find, as the main feature, an effort to decentralize functions and powers in order to obtain

more efficiency and to be more effective. The “welfare” is also changing this way and after twelve years of reforms and decentralization efforts we may focus on the assessment of their results and impact (Izzo, p. 1).

The public welfare system including regulations over social policy and public institutions is in place, although the government reportedly lacks the financial sources to support the system. Deeply institutionalized corruption and a weak judiciary are key obstacles to improving the public welfare, as corruption reduces revenues and disproportionately hurts the poor. In the period under review, the IMF has called upon the government to restore the sustainability of public finances and review the country’s welfare system. Despite the reminders, the government opted to increase public wages and pensions in 2012; at the same time in the draft budget 2013 the government provides new increase for salaries and pensions (Stiftung). This is a welfare growth indicator, but unfortunately current economic situation does not allow this growth, in this moment the public debt is more than 60% and the deficit is bigger than 3%, parameters that indicate us the dividing line between a healthy and weak economy, and Albania in this case shows that is going through an economic crisis.

At the other hand the United Nations Human Development statistics places Albania as a country with a high level of human development. The indicator of Human development is an aggregate indicator, measuring the development by combining indicators as *life expectancy*, *educational attainment* and *income* into a composite human development index, the HDI, classified: very high, high, medium and minimal, and Albania has a high human level development, for all the decade, 2000-2011. The table bellow shows us the values of HDI for Albania related with the values of classified levels indicator.

*Table no.1 Human Level Development (HDI)<sup>1</sup>*

|                                    | 2000         | 2005         | 2006         | 2007         | 2008         | 2009         | 2010         | 2011         |
|------------------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| <b>Very High human development</b> | 0.858        | 0.876        | 0.879        | 0.882        | 0.885        | 0.885        | 0.888        | 0.889        |
| <b>High human development</b>      | 0.687        | 0.716        | 0.721        | 0.728        | 0.733        | 0.734        | 0.739        | 0.741        |
| <b>Medium human development</b>    | 0.548        | 0.587        | 0.595        | 0.605        | 0.612        | 0.618        | 0.625        | 0.630        |
| <b>Minimal human development</b>   | 0.383        | 0.422        | 0.430        | 0.437        | 0.443        | 0.448        | 0.453        | 0.456        |
| <b>Albania</b>                     | <b>0.691</b> | <b>0.721</b> | <b>0.724</b> | <b>0.729</b> | <b>0.733</b> | <b>0.734</b> | <b>0.737</b> | <b>0.739</b> |

Source: HDRO calculations based on data from UNDESA (2011), Barro and Lee (2010), UNESCO, Institute of Statistics (2011), World Bank (2011a) and MIF (2011)

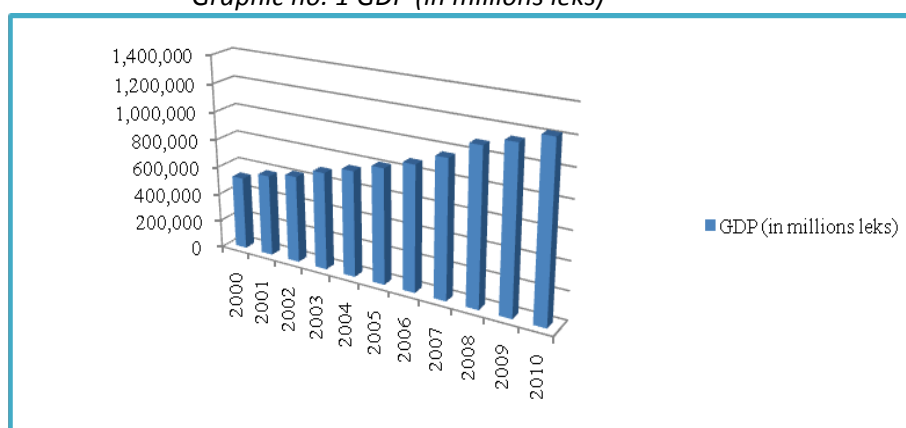
<sup>1</sup> A compound index measuring the average achieved in three basic dimensions of human development - a long and healthy life, knowledge and a decent standard of living.

### ***Economic Indicators***

I will start analyzing economic Albanian state background by three indicators, GDP at current prices (million leks), GDP per capita (million leks), Annual real growth of GDP at constant prices compared to previous year (%) indicators that gives us a clear situation about economic progress. Analyzing firstly these three indicators, for the period 2000-2012, we will the economic progress of Albania over the years, and after that will analyze the redistribution of expenditure of social protection.

Albania as a country in transition for about 20 year and from the economic point of view has had its problems, but however we can see significant economic growth. Over the period 2000-2010 the GDP of Albania indicates an increase with 57.21 %, in the year 2000 it was 523,043 million leks and in the year 2010 it was 1,222,462 million leks.

*Graphic no. 1 GDP (in millions leks)*

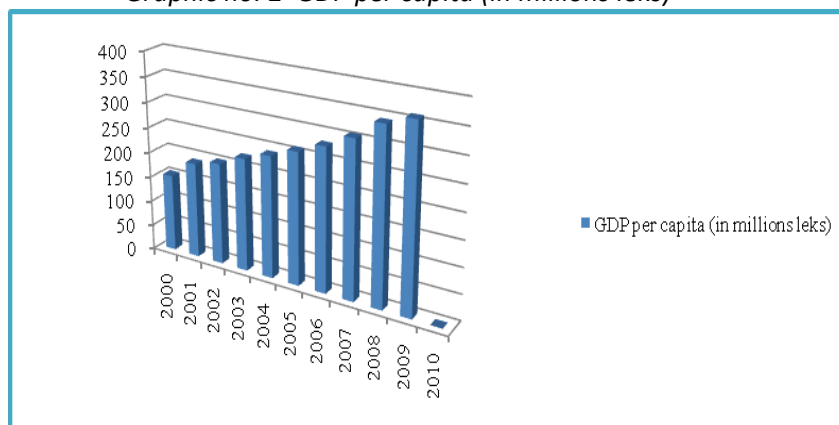


Source: INSTAT

Estimation of purchasing power parity is complicated by the fact that countries do not simply differ in a uniform price level; rather, the difference in food prices may be greater than the difference in housing prices, while also less than the difference in entertainment prices. People in different countries typically consume different baskets of goods. It is necessary to compare the cost of baskets of goods and services using a price index. This is a difficult task because purchasing patterns and even the goods available to purchase differ across countries ([http://en.wikipedia.org/wiki/Purchasing\\_power\\_parity](http://en.wikipedia.org/wiki/Purchasing_power_parity)) Thus, it is necessary to make adjustments for differences in the quality of goods and services. In Albania the GDP purchasing power parity (PPP) estimated from 1200 \$ in the year 2000, to 4029 \$ in the year 2009, with an increase with about 70%.



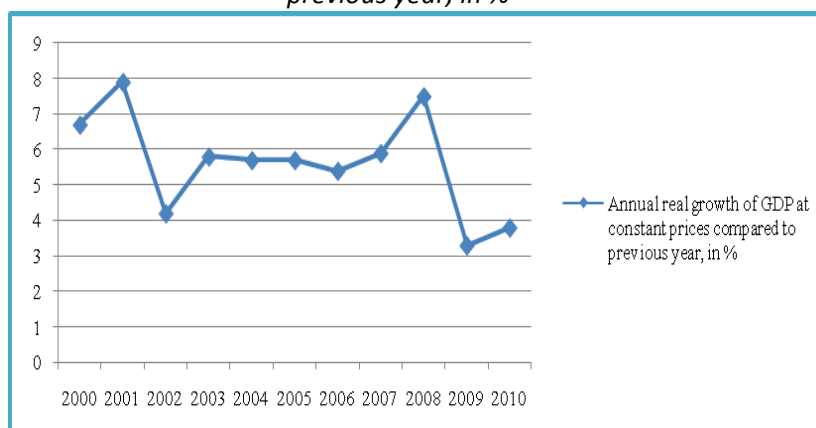
*Graphic no. 2 GDP per capita (in millions leks)*



Source: INSTAT

The annual growth of GDP at constant prices compared to previous year gives us clear evidence about the annual increase of PIB, which has reached different values in different years, e.g. the higher value is 7.9% in the year 2001, and the lowest value is 3.3% in the year 2009. In the country ranking for annual growth of GDP, for the year 2010, Albania is in ranked at 130 places, with a value of 3.5%.<sup>1</sup>

*Graphic no. 3 Annual real growth of GDP at constant prices compared to previous year, in %*



Source: INSTAT

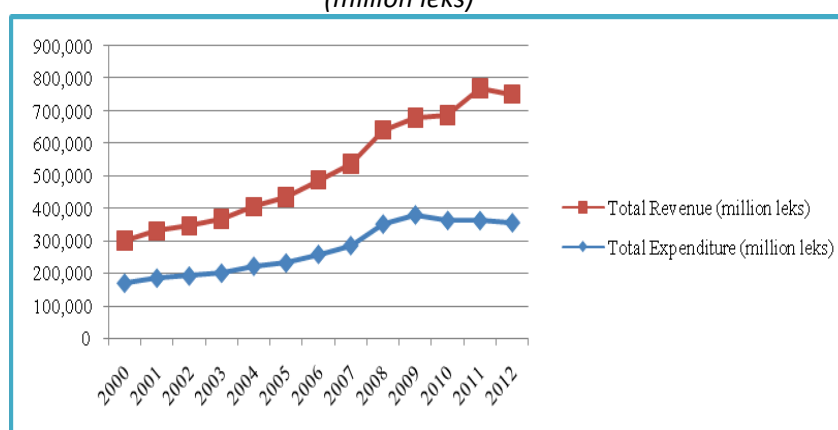
The analyses of budget is very important because is the government document policy that reflects the country's economic and social development. The level of budgetary indicators should be in harmony with other economic

<sup>1</sup> [http://www.photius.com/rankings/economy/gdp\\_per\\_capita\\_2012\\_0.html](http://www.photius.com/rankings/economy/gdp_per_capita_2012_0.html)

indicators. A high level of spending can lead to increased money circulating in the economy of rising prices. In case of large expenditures, judged as necessary for further development of the country, should be thought how income must cover these expenditures, in order to create a balance. Over the past 12 years, 2000-2012, the state budget, related to indicators such as revenues (income) and expenditures, has gone through a significant increase, where revenues have increased by about 2, 7 times more while the expenditures are also increased by 2.3 times more. As is noted revenues have been increased, but reported with expenditures, they create a deficit.

Respectively will see that for the year 2001 are 130.642 million leks incomes, while the expenditures are 170,621 million leks, with other words revenues are 76.5% of expenditures, or revenues are 23, 5% lower than the expenditures. While in 2012 revenues are 355,759 million leks, and expenses are the 396,922 million leks, where revenues are about 89, 6% of the expenditure, or revenues are 10.4% lower than the expenditures.

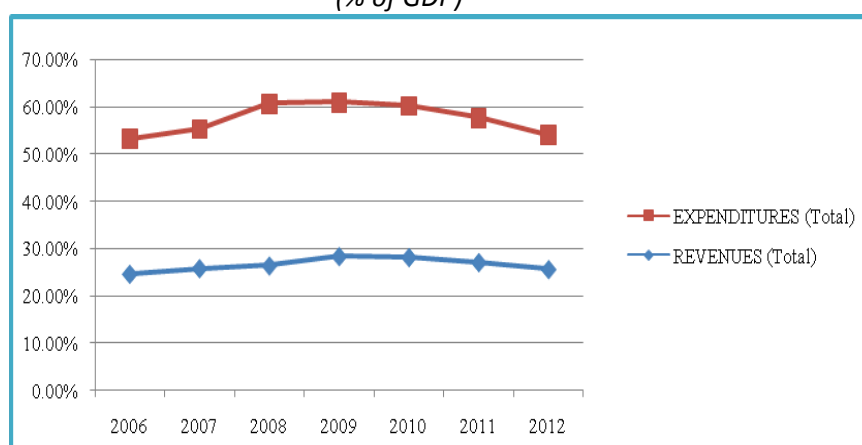
*Graphic no. 4 Consolidated Budget, 2000-2012, Total revenues/Total Expenditure (million leks)*



Source: INSTAT; Ministry of Finance

As can be viewed from the graphic, the report of expenditure to GDP for the period 2006-2012, the medium value is 30.9%, while the minimal value of expenditures is 8.60% in 2012, and the maximum value is 34.30% in 2008. While the report of revenues to GDP in the year 2011 has minimal value 30.60% and maximal value is 34.30% in 2008. The tendency of the recent years of revenues and expenditures related to DGP comes in decrease, which means a declining economy, influenced at the same time by the economic crises in the Europe, crisis that is reflected in the distribution of revenues and expenditure for social protection.

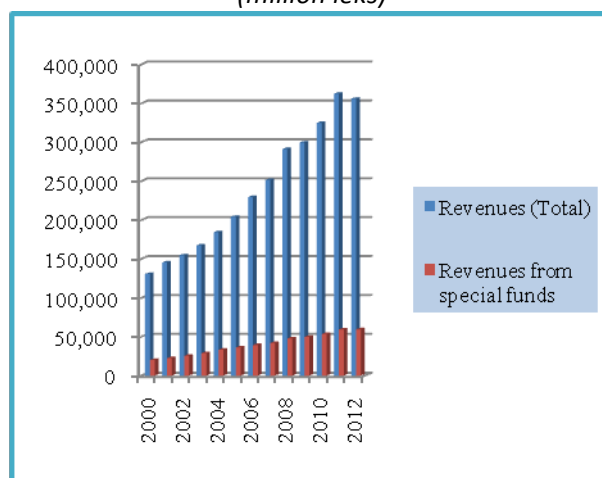
*Graphic no. 5 Consolidated Budget, 2006-2012, Total revenues/Total Expenditure (% of GDP)*



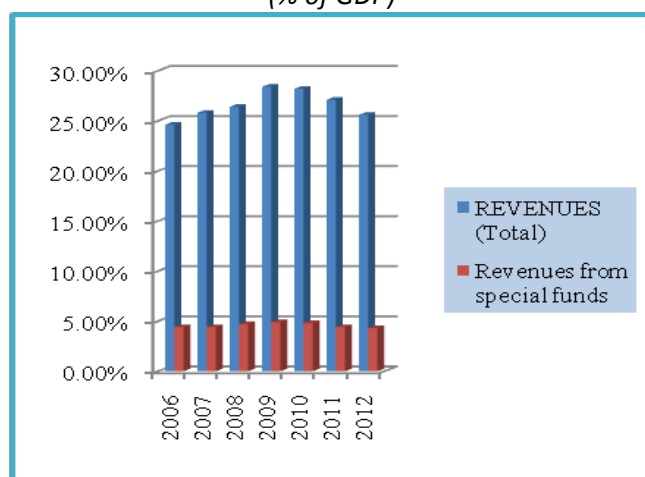
Source: Ministry of Finance

In the following graphs will create a clear view of revenues and expenses allocation in social policies areas. The identification of the level of expenditures, supported in social schemes, make us known the level of welfare, where the redistribution of expenditures is a priority of Albanian government. This redistribution does not automatically entail that it creates more equality, but the role of the state is the fight against poverty and to make possible a wider social inclusion.

*Graphic no. 6 Total Revenues/Revenues from special funds, 2000-2012, (million leks)*

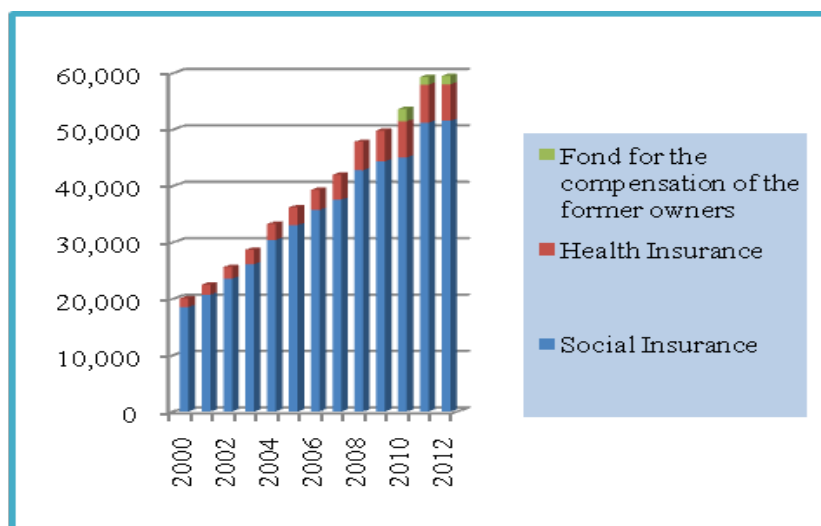


*Graphic no.7 Total Revenues/Revenues from special funds, 2006-2012, (% of GDP)*

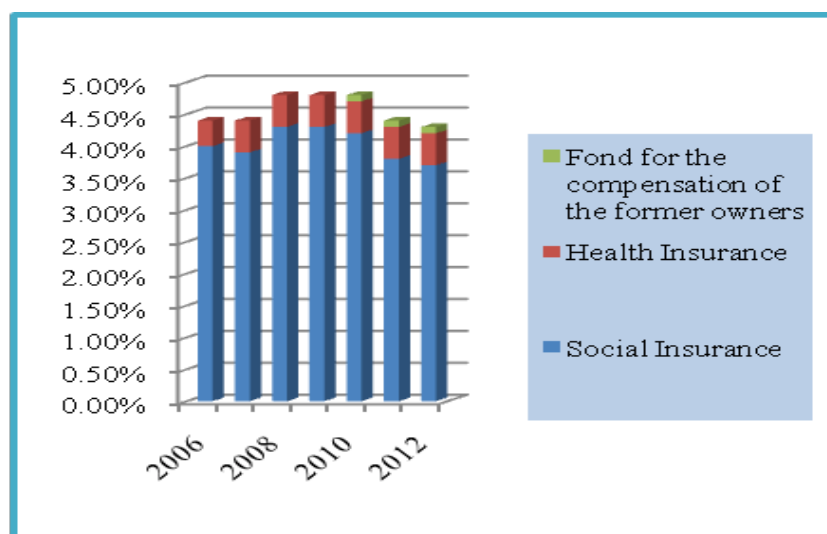


Source: INSTAT; Ministry of Finance

*Graphic no. 8 Revenues from special funds, 2000-2012, (million leks)*

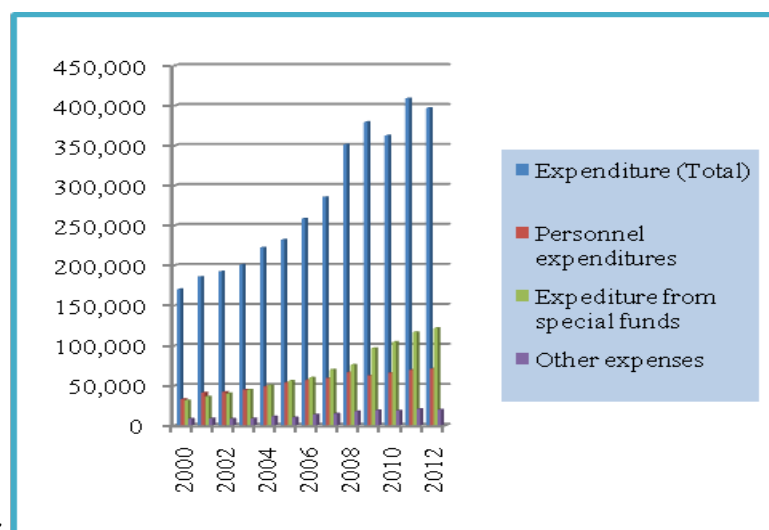


Graphic no. 9 Revenues from special funds, 2006-2012, (% of GDP)

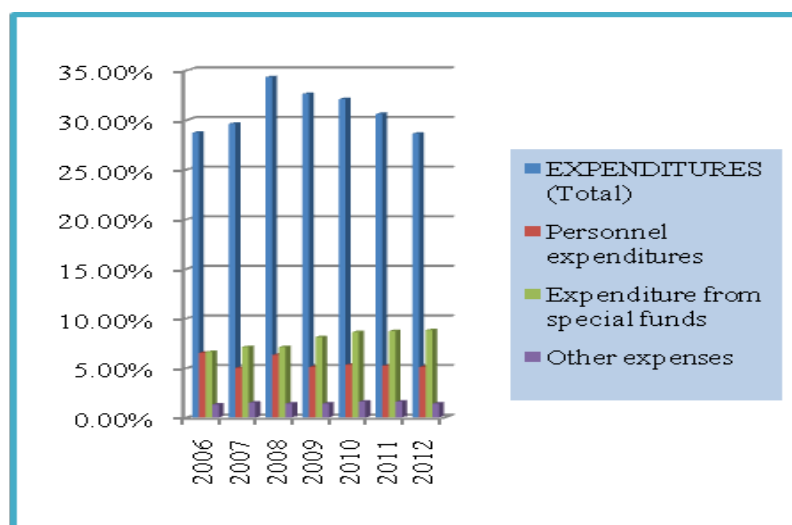


Source: INSTAT; Ministry of Finance

Graphic no. 10 Total Expenditures/Personnel expenditures; expenditures; Expenditure from special funds; other expenses, 2000-2012, (million leks)

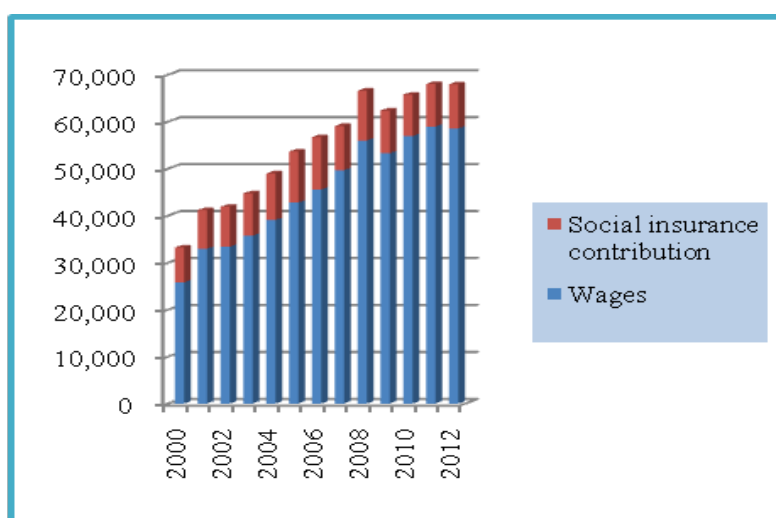


Graphic no. 11 Total Expenditures/Personnel; Expenditure from special funds; other expenses, 2006-2012, (% of GDP)

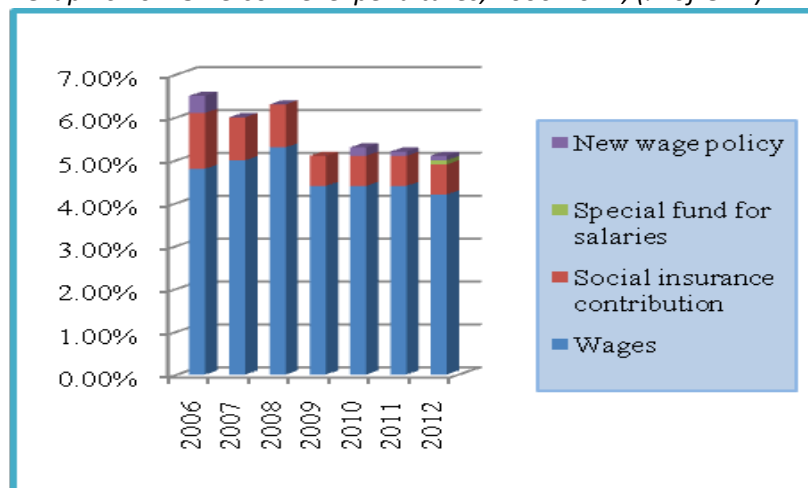


Source: INSTAT; Ministry of Finance

Graphic nr. 12 Personnel expenditures, 2000-2012, (million leks)

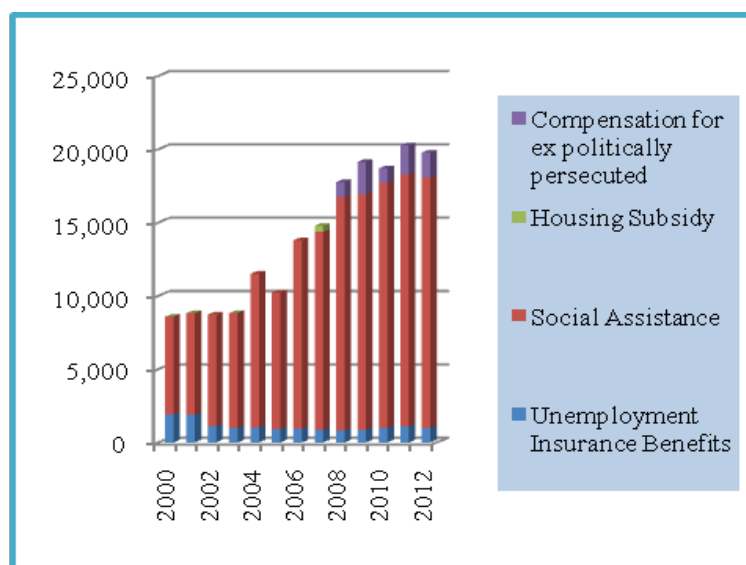


Graphic no. 13 Personnel expenditures, 2006-2012, (% of GDP)

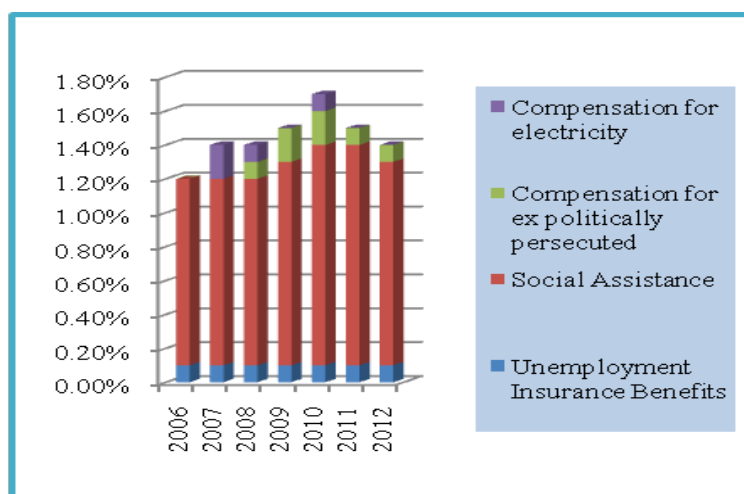


Source: INSTAT; Ministry of Finance

Graphic no.14 Other expenditure, 2000-2012, (million leks)

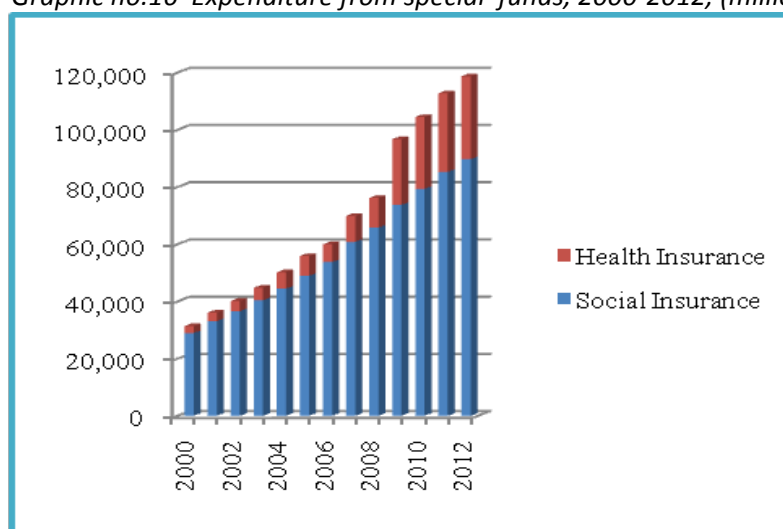


Graphic no. 15 Other expenditure, 2006-2012, (% of GDP)



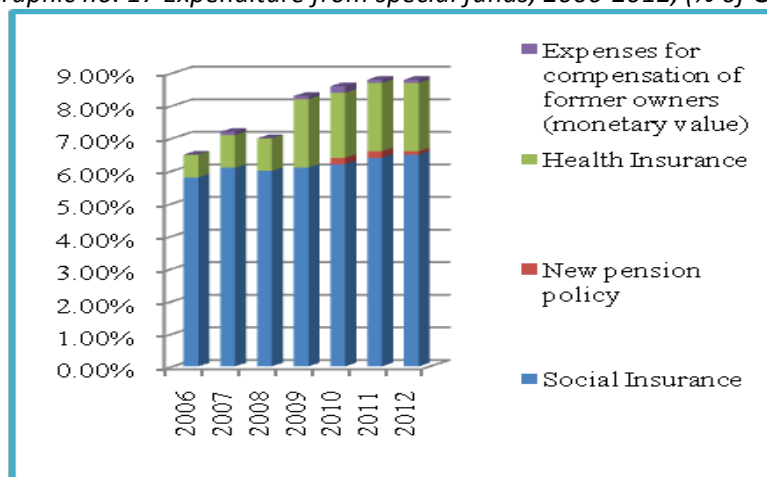
Source: INSTAT; Ministry of Finance

Graphic no.16 Expenditure from special funds, 2000-2012, (million leks)





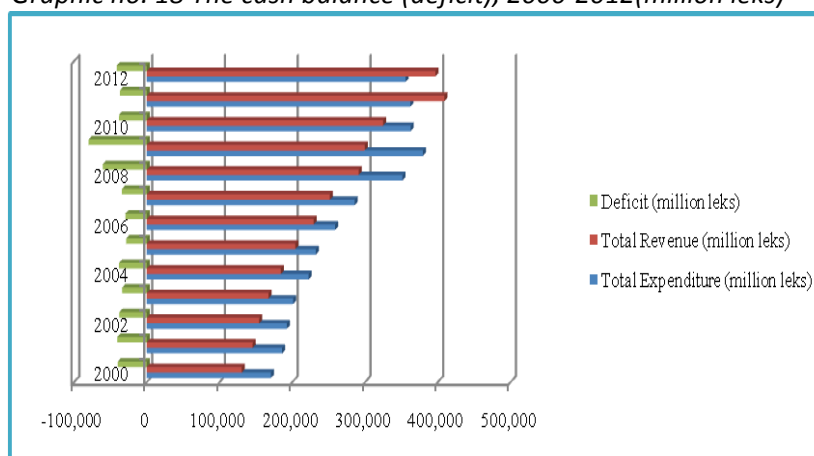
Graphic no. 17 Expenditure from special funds, 2006-2012, (% of GDP)



Source: INSTAT; Ministry of Finance

As we can see by the graphics above that is created difference between expenditures and income in terms of budget, this difference is called deficit. This deficit has reached different values in the period 2000-2012, which achieves the greatest value with 60.436 mil. leks in 2008, and the minimal value in 2012 with 41,163 mil. Leks. To cover the budget deficit, the government borrows internal and external or otherwise said that is financed by internal and external resources.

Graphic no. 18 The cash balance (deficit), 2000-2012(million leks)

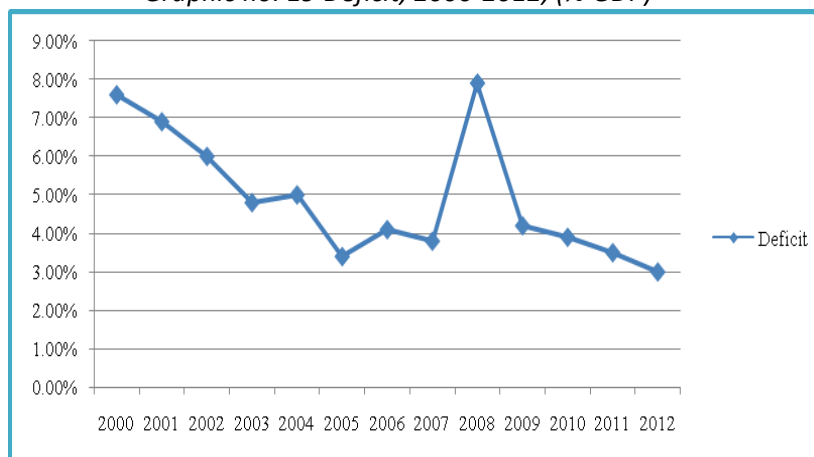


Sours: INSTAT; Ministry of Finance

Usually, to estimate how deep the deficit of a country is, its calculated reported to the production of a country (Gross Domestic Product). This figure shows what part of the value of total production of the economy takes deficit

state budget. In the case of Albania, in the period 2000-2012, the deficit budget will reach maximal value of 7.90% in the year 2008 and the minimal value of 3% in 2012. In order to avoid a economic crisis, related to deficit budget, the IMF has estimated the 3% as limit value, in the case of exceeding this value the economy of a country begins to oscillate. Albania as a transitional economy, in the years analyzed, has gone through the critic value of 3%, which means that should take measures to prevent the growth in order to not enter in recession.

*Graphic no. 19 Deficit, 2000-2012, (% GDP)*

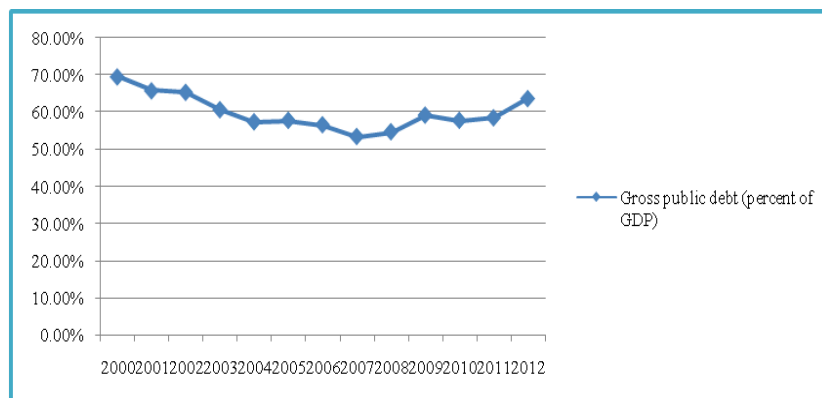


Source: INSTAT; Ministry of Finance

Albania is facing with an economic recession and the economic regeneration in 2013 is expected to be a very slow one. According to the World Bank, this is due to decline of exports and foreign investment as a result of the debt crisis in the euro area and due to the shrinkage of the remittances from citizens living and working abroad. At the same time IMF analyzing the economic situation of Albania is expressed that the government should be more careful with the deficit and the public debt.

According IMF estimates, in 2011, the public debt in Albania for the period 2013-2017 is expected to grow up until 70% of GDP, which is a dangerous indicator for the Albanian economy, because about 70% of the budget goes for debt repayment. Increase which will be observed this year, 2013, after a period, 2004-2012, in which public debt has not exceeded 60%. Albanian government should be more careful with the economic situation and the increase of the wages and pensions, because in times of crisis these increases are not recommended, policy pursued each year by the current government, instead of, should be reduced excessive expenditures.

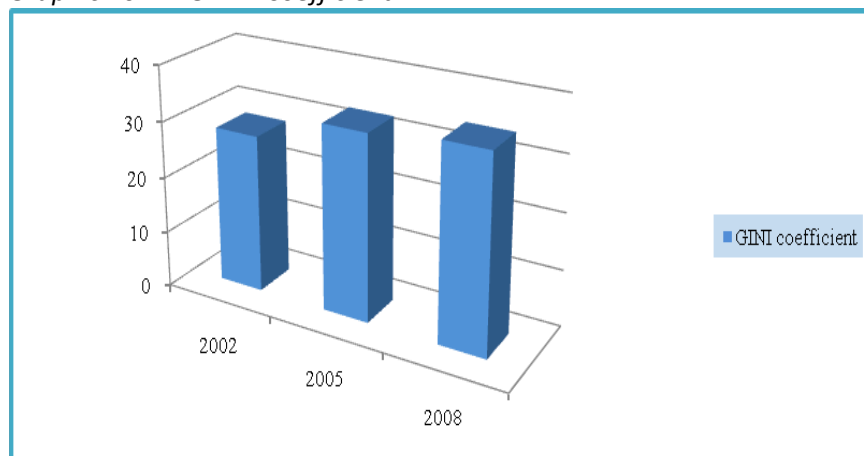
*Graphic nr. 20 Gross Public Debt (% of GDP)*



Source: International Monetary Fund

Moreover another indicator is the GINI coefficient that measures the inequality among values of a frequency distribution, considering the effect of taxes and transfer payments, this coefficient ranged between 0.24 to 0.49 after taxes, is calculated on income after taxes and transfers, and it measures inequality in income after considering the effect of taxes and social spending already in place in a country, and 0.34 to 0.53 pre-taxes. In addition, the country's GINI coefficient for Albania, shows that over the years the economic inequity has increased; the GINI score, after taxes, has jumped from 28.15 in 2002 to the 34.51 in 2008, with an increase of GINI coefficient from 2002-2008 with 5.82 %. This statistical date shows us that the inequality is increased over years in Albania, which means that the income distribution in Albania is not done adequately, the taxes income and transfers doesn't cover the social spending.

Graphic no. 21 GINI Coefficient



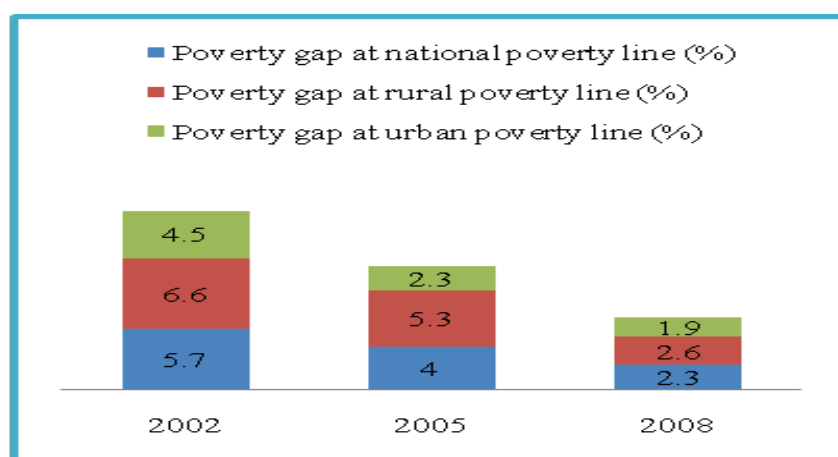
Source: World Bank

Regarding the national poverty line at national level is very clear that in Albania has been increased significantly the level of poverty, during the years 2002, 2005, 2008. According World Bank and INSTAT, at the national level the poverty gap is 5.7 % in the year 2002, which decreased in the year 2008 estimated 2.3%.

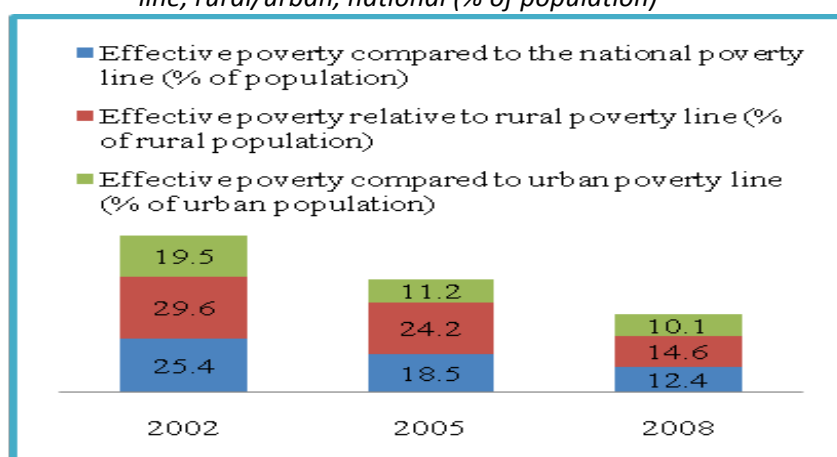
This poverty is reflected differently in urban and rural areas, in the rural areas the line of poverty is higher estimated with 6.6% in the year 2002, which decreased in the year 2008 estimated 2.6%; in the urban area the line of poverty is lower reported to rural areas, the poverty line is estimated in the year 2002 – 4.5% and in the year 2008 – 1.9%.

At the same time the effective poverty compared to the poverty line is: at national level during in the year 2002 – 25.4% of the population that lives below the poverty line and in the year 2008 - 12.4% of population that lives below the poverty line. In the rural area the effective poverty is higher than the urban area, estimated in 2002 – 29.6% and in 2008 – 14.6%. The same situation is for the urban area where is estimated a decrease of 49% of population that lives below the poverty line.

*Graphic no.22*  
*Poverty gap at national level, rural/urban, %*



Graphic no. 23 Effective poverty compared to the national poverty line, rural/urban, national (% of population)



Source: World Bank

Inequality in income distribution and unbalanced development between areas/regions of the country has deepened the polarization of the society. In conclusion, the poverty estimated by the dates mentioned above is measurable not only by unemployment and the unbalanced distribution of income, but also by limited access and impossibility to benefit from the health protection programs, education, socio-cultural, etc. Consequences of poverty appear also in the malnutrition of the family, especially of the children, school abandonment, inclusion of children in various forms of work (street children.) or in human trafficking, human violation, etc.

Poverty and limited access to social services has a direct impact on the living standards of disadvantaged social groups by denying the right to live with dignity and care. To curbing these phenomena and alleviating the consequences for all vulnerable groups, the Albanian government has built a special social protection system present; to protect the poor and vulnerable groups with disabilities implemented programs that support them in cash as:

- Economic assistance program;
- Payment program for people with disabilities, and
- Social services delivery program for individuals in need (<sup>1</sup>*Social Services Strategy*, p. 16-17).

According to the Law no. 7703, dated 11.5.1993, for "Social Insurance in the Republic of Albania" provides several categories covered by compulsory social insurance contributions, as:

- Temporary inability to work because of illness;
- Maternity;
- Old age, disability and loss of family holders;

- Accidents at work and occupational diseases;
- Unemployment (Law no. 7703);

Social Insurance shall provide compulsory protection to all economically active citizens in Albania in case of income reduction due to:

- Maternity;
- Old-age;
- Disability;
- Loss of breadwinner.

Social insurance shall further protect all the employed persons in the case of reduction of earning due to:

- Temporary incapacity caused by sickness;
- Employment accidents/professional diseases and;
- Unemployment.

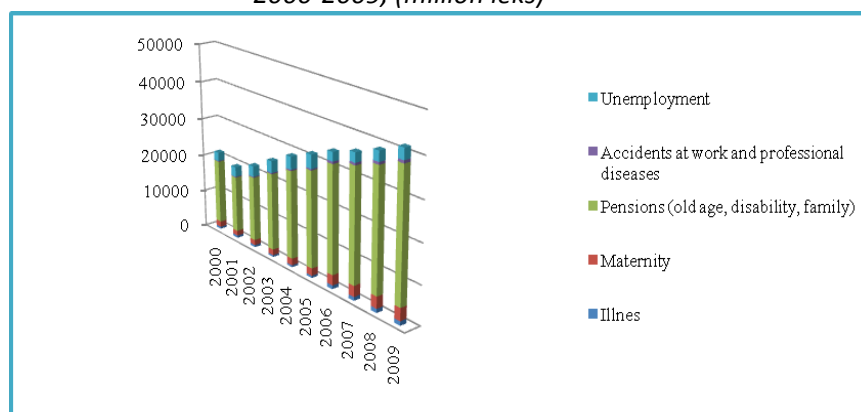
The Council of Ministers may decide on other area of protection and on exceptions for:

- Seasonal and temporary workers;
- Self-employed people in agriculture;
- Unpaid family workers of self-employed people;
- Apprentices and students during the period of practice; these persons are insured by employers for employment accidents only (Idem)

This law does not include the scheme of assistance those citizen who are part of these categories, but have not been employed. So a considerable part of population is excluded by economic aid.

In the graphic below is clearly the revenues according the branches of social security contribution, in the period 2000-2009.

*Graphic no. 24 Revenues according the branches of social security contributions, 2000-2009, (million leks)*



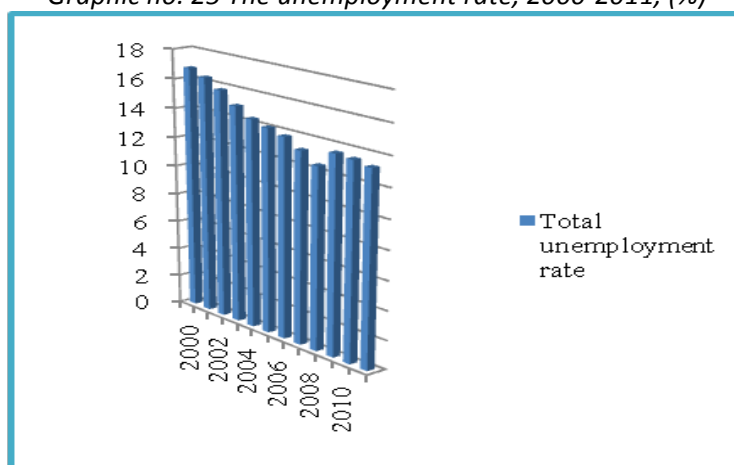
Source: INSTAT

Macroeconomic reforms and structural changes during the entire previous decade led to a sharp fall and to a reshuffling labor force in Albania. Even on the basis of a more extended definition of unemployment the rate was not higher than 16.5% in 2000 and dropped to 12.6% in 2008.

Data on registered unemployment show a decline over the past few years that appears to be fairly similar for male and female, and for those who are short- and long-term unemployed. Unemployment seems to have fallen more rapidly for those with secondary or higher education than for those with a primary level education only.

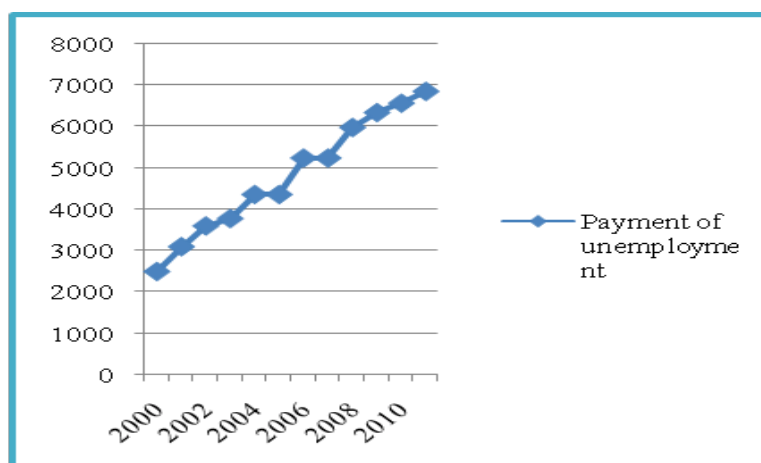
A high level of unemployment indicates that a considerable part of working age population is not contributing social schemes, but it is a category of the population subsidized by the state through various social assistance schemes. From the budget of the state the subsidies in monetary terms are at low levels, although the budget for this category has been growing. All categories: illness, maternity, pensions, accident at work and professional diseases and unemployment are involved in social insurance schemes specified in Law No. 7703, dated 11.5.1993, for "Social Insurance in the Republic of Albania" and other laws, and at the same time by regulations of this laws. It's true that the legal part in Albania in most of the part is in place, but if will make a comparative analysis with other countries in the region still is very much to do.

*Graphic no. 25 The unemployment rate, 2000-2011, (%)*



Source: INSTAT

Graphic no. 26 Payment of unemployment, 2000-2011, (million leks)



Source: INSTAT

In Albania, according to INSTAT number of registered unemployed who benefit from aid schemes, for the period 2000-2011, involving a relatively small number, where in 2000 only 10.2% of the registered unemployed receive unemployment benefit, while in 2011 is 5.9%, considering also that the number of registered unemployed has decreased by about 32.35%.

Registered as unemployed for a long period are a considerable part of the unemployed who have reached the value of approximately 89.60% of the registered unemployed in total, in 2000, while in 2011 reached the value of 62.30%.

### Conclusions

Albania is a country with many natural and human sources and it is eager to follow the process of European integration through different reforms. Social services reforms need to be focused more on institutional capacity building in order to increase the transparency and the quality of services.

Financing is one of the challenges for a sustainable and adequate social protection system. Aspects of the social system finances, the funding sources of social protection system, and the destination of those financial resources are considered in detail.

The main challenges that the actual system faces are the provision of social protection benefits in the future for the entire population, which has been the main feature of the previous system, at least for old-age pensions. In



addition, the provision of benefits to meet at least the basic needs, which actually are not adequately provided mainly by unemployment insurance and social assistance together with the response to the new social problems of women, children, disabled, emigrants and other vulnerable groups by integration of various benefits, in cash and in services at the central and community levels constitute the other challenges of this system.

The system of social protection for the unemployed is relatively weak, since only a small portion of the unemployed is eligible to receive unemployment insurance benefits. This is explained by the fact that the current system foresees benefits only for those who have paid social contributions during their last year of employment. The high level of economic activities in the informal sector means that the portion of benefits is small.

The extension of the social protection system with family and child benefits, as part of the social assistance or social insurance system is put forward as a recommendation. Further research should present the government with a number of alternatives, taking into account the effects on family poverty, the effects on income inequalities, on gender issues and on access of children in education. The social intervention on children will have effects on family poverty, access in female employment, education/ health, etc.

There is a need for new schemes for protecting family and especially the children. In the context of economic and social problems, traditional values and roles in the family, isolation and lack of proper education/ health and other services, as well as demographic tendencies on reducing the child birth are asking for intervention on family support, on parenting supporting and early child development. The fact that women are increasingly employed in the informal sector, or in unpaid family-based activities, women's unpaid care responsibilities on children and elderly are asking for new forms of social protection schemes. That is why extending the social protection system with family and child benefits, as part of the social insurance system or social assistance and services has to be considered.

It's very difficult to analyze the real situation of welfare in Albania by social statistics because there are still weak. Different institutions are using their own administrative indicators which are not referring to the official national statistical office. The informatisation process that has started in most of the agencies responsible for the administration of social protection schemes needs much support, first to do the real analysis and evaluation of the programs, and secondly, to avoid the corruption in the system.

After a simple analysis that has to do more with the financial side of the welfare, materialized by social policies, we can conclude that the future reforms may be focused more on treating the system as a whole, where any change in one scheme to be part of the integral consequences in others to approach the complex social needs.

Policies need to be put in place seeking to prevent eventual life crises which can lead to situations of social exclusion, such as indebtedness, exclusion from school and becoming homeless. Furthermore, implementation of actions to preserve family solidarity in all its forms and to promote the social integration of women and men at risk of facing persistent poverty, because of disability or belonging to a group experiencing particular integration problems need to be accompanied with the elimination of social exclusion among children and give them every opportunity for social integration and generally with comprehensive actions in favor of areas marked by the social exclusion.

In other words, the state must be present in the lives of its citizens, supporting them with better and inclusive social policies, with a large social inclusion of vulnerable categories, as well as services and financial support for a healthier society in the future.

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## IMPACT OF THE SOCIAL ECONOMIC CRISIS ON THE POPULATION'S PHYSICAL AND MENTAL HEALTH

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**Abstract:** *This article is analyzing the influence of the economic global crisis on the health systems, offering a case study of Romania, country where the reform of medical system had a strong impact on the physical and psychical health of people. From a psychological point of view, the citizens that were hit by the crisis have not been trained or prepared in advance, in order to know how to act in similar situations. The absence of national programs of public health of adequate educational plans forced each person to use his own intuition, will, rationality and life experience.*

**Key words:** *crisis, under-financing, health system reform, physical/psychical health*

### Introduction:

Economic crisis is an ambivalent phenomenon inducing both negative, dysfunctional effects and consequences and positive, functional ones. Of course, positive aspects are not that prominent and they mainly refer to the adoption of a more balanced behaviour by economic agents and population, general decrease of prices, especially in the real estate field (in certain cases, properties were purchased at a third of the price required before the crisis). The negative effects or the general risks refer to the quality of the people's social-economic and cultural life at a national level, while, at global level, the economic crisis affected the political and economic hierarchy of the world states.

The phenomenon of the economic crisis has brought a multitude of influences and negative determinations at social level, such as: reduction of jobs, and, implicitly of secure incomes; increase of debtors' rate and forced executions; pauperization of large social categories and extension of poverty; visible deterioration of life quality and chances of future evolution of numerous human collectivities, etc.

## **1. Crisis of the medical system and physical health protection**

In March 2009, the director of the World Health Organization (Margaret Chan) warned that tens of thousands of women and children lose their life due to the economic crisis; she estimated that 200,000 to 400,000 children risk losing their life annually.

Past statistics indicate that half a million women die annually (due to complications in pregnancy, labour and birth), while, every three seconds, a child loses his/her life due to health problems. Presently, poorly developed countries spend only 18 euros, on average, on health care per person, while developed countries spend 3,127 euros; thus, on the background of the economic crisis, health care system is highly vulnerable in developing countries.

In Romania, the most important issues refer to medicines supply (medicines were not paid for several months in 2009) and the population's decreasing interest in protecting its own health. Compared to 2008, in 2009, the Romanians appeared less interested in their health, the economic crisis exerting a great impact on their psychology. Most of them postponed regular visits to specialists, treated themselves or went to the family physician or called the emergency service when their health problems aggravated. Pensioners or disfavoured social categories – poor couples with many children that do not have a family physician confronted with this situation.

In 2009, the experts of the Health Insurance House considered that, only 200 sanitary units of 472 present at national level should have been financed as hospitals, while the others should have been transformed in medical-social centres (which might solve the problem of numerous old people that do not benefit from health care or medical assistance except for emergency situation). According to Health Ministry, in Romania in 2009, there were five million persons contributing to the health insurance fund, while 10.8 million persons were uninsured and benefited from free medical services.

One of the measures proposed by the Romanian government for reforming the sanitary system was to merge some hospitals, to close other hospitals and transform them into elderly asylums. The implementation of this measures, especially that concerning the closing of certain hospitals, provoked strong reactions of both the opposition parties and numerous inhabitants of the regions subject to the 'sanitary reform', especially those from rural areas. In rural communities, the transformation of hospitals into elderly asylums was totally uninspired as traditional rural mentality morally sanctions elderly official institutionalization.

According to the reform plan of the medical system from Romania, of the 435 sanitary units with beds (administered by both state and local authorities) registered in the beginning of 2011, 182 units were proposed to lose their legal personality and reorganize in external sections.

Of the 182 hospitals, 111 sanitary units were to be merged and 71 to be transformed into elderly asylums or centres for permanence ([www.comunicatemedicale.ro](http://www.comunicatemedicale.ro)). The initial data of the medical system reform plan were not totally respected and, thus, in April 2011, only 67 hospitals had been closed.

## **2. Degradation of the population's mental health**

Psychologically, the citizens of the states that were deeply affected by the economic crisis had not been previously prepared or trained to deal with such situations. As there were not national programs for public health or adequate education plans, each individual had to rely on his/her own intuition, will, ration and life experience.

Generally, people do not have the necessary abilities to evaluate correctly a worsening economic situation and thus they are not able to take a decision in case of failure. At the same time, they do not know to preserve their emotional balance if confronted with risk and crisis situations. Hasty and radical reactions, irrational thinking and naïve attitude (*7Plus*, 2009, p.11) towards the challenges of the economic environment (including loans and debts high above their real incomes) made many persons that had failed in business experience insomnia and intolerance, panic attacks, catastrophic vision in case of bankruptcy and, sometimes, even commit suicide.

Many of the persons that are fired are incapable to assume risks and think about an occupational alternative; moreover, if they are more than 50 years old, they feel they are secluded, marginalized, they do not admit personal failure and let themselves overwhelmed by frustration and anxiety. Thus, it results the necessity of a psychiatry of the global society and education plans for crisis situations, able to promote prudent optimism, correct perception of reality, moderation and rational behaviour (set up on viable norms and authentic guiding values).

During the crisis period, almost everybody is psychologically affected, but differently from one person to another and from one social-occupational category to another (starting from the common unemployed person to the top manager or extremely rich employers). Different studies achieved at European level indicate that the persons who got fired due to the crisis, emigrants who lost their jobs, persons with disabilities and consumers of psychotropic substances are more predisposed to mental health problems.

'In EU countries, one in four persons is affected by a form of psychic disorder, at least once in a lifetime. At the same time, one in six European women is presently [February 2009 – *n.ns.*] affected by depression; the experts of the European Parliament estimate that, until 2020, this mental disorder will be the most frequent in the developed world and the second cause of disability.

At the same time, in the UE, there are registered about 59,000 suicides annually, 90% of which being attributable to mental disorder' (Vaduva, 2009, p. 6).

Although the Romanians are not accustomed to go to psychiatrists (they are afraid of not being labelled as 'crazy' by their acquaintances), on the background of the crisis, the situation changed: 'Most of the Romanian experts in mental health recognize that in December 2008 and January 2009 had a double number of consultations compared to the same period in the previous years' (Idem). If before the start of the crisis people went to see a psychiatrist especially to seek advice in sentimental or communication problems in the workplace, by the beginning of 2009, it was noticed that almost 70% of the patients were afraid of losing their well-paid jobs.

All these problems at the workplace affect employees' personal life as well. For example, losing the job may trigger a family crisis (Nica, 2009, p. 6). Family crises generated by the dismissal of a family member (especially if this member is 'the head of the family') intensify a bad climate and there are numerous cases when such situations end in murder. For example, a man from California had a breakdown, killed his wife and five children aged between 2 and 8 and then committed suicide because he had lost his job (*7 Plus*, 2009, p.12). Another shocking case is that of a 32-year-old disabled man from Arad (Romania), who desperate with local authorities indifference (they did not help him obtain a dwelling place and a job as he lived in a wheel chair), sprinkled himself with gasoline and put on fire, sick with his miserable life and lack of solidarity.

Consequently, severe material shortcomings, vital frustrations and lack of hope awaken the human being's aggressiveness instinct towards other people and oneself, instinct that becomes uncontrollable.

Insomnia and panic attacks (both indicating anxio-depressive disorders), depression and anxiety, suicide attempts are the main problems treated by experts in our country. 'Psychiatrists and psychotherapists consider that the Romanians' mental disorders are generated especially by material and moral loss. Depression is a disorder that, in the last years, affected 10.01% of the Romanian women and 3.06% of the Romanian men, according to the study elaborated by the health watch centres MEDINET' (Vaduva, 2009).

Thus, the present economic crisis was a disaster not only for people's social life, but also for their psychic balance or comfort. Certain analysts consider that this crisis 'panics everybody, even those that are very stable psychologically. Experts in mental health say that, in front of major problems they will face due to crisis certain people inhibit a lot, while others ignore their responsibilities. Just a little part of those affected by the economic crisis will try to find solutions to fight back the undesired effects of the recession' (Idem).

The lack of solutions and incapacity of adaptation to the challenges of the crisis make many common people (plunged into debts), certain managers

(that administered millions of dollars), and even extremely rich persons (dependent on money) commit suicide. For exemplification, we render a few cases highly mediatized and took over the aforementioned paper: Kirk Stephenon, a New Zealander finance man (with an annual profit of 330,000 pounds), threw himself in front of a train after more unsuccessful transactions on the capital market on the 27<sup>th</sup> of September 2008; Adolf Merckle, a cement producer from Germany (wealth estimated at 9.2 billion euros in 2008), stood in front of a train after he found out his company is insolvent on the 5<sup>th</sup> of January 2009; Steven Good, the American magnate of real estate market shoot himself without living any message and he was found dead in his car in a parking on the 5<sup>th</sup> of January 2009. There can be added numerous rich people, who, in spite of their fortune, were exposed to financial risks induced by the economic crisis. Suicide is the solution chosen by many American and West-European financiers, which legitimates a new syntagm, already used by some researchers – that of ‘economicide’. Moreover, this type of suicide and social phenomenon were studied by the French sociologist Emile Durkheim even at the end of the 19<sup>th</sup> century (Durkheim, 1993). He underlined that, in crisis situations, people lose hope to socially clarify their problems.

Suicide proves the sensitivity and vulnerability of human beings when confronted with unforeseen risks and crisis moments. Consequently, the myth ‘iron man’ or ‘superman’ is just a bitter illusion as, in real life, it is important to know the resistance potential and respect biological, psychological, moral, and professional limits of each individual (especially in relation with banks, an issue we have tried to clarify in the present work).

According to the experts of the *National Institute of Legal Medicine ‘Mina Minovici’*, in the period November-December 2010, in Romania, the number of suicide attempts increased with 30% compared to the similar period of 2009. The causes of this increase are related not only to the manifestations of the world economic crisis but also to some of its social consequences – degradation in interpersonal relations, amplification of injustice, lack of values, hope and confidence in fundamental institutions of society (family, justice, church, public official authorities), in the solutions proposed by the government (*Evenimentul Zilei*, 2011; Turcu, 2011).

Of course, besides the consequences thoroughly rendered in the previous paragraphs, there are others such as the increase of infraction rate (especially theft, bank robberies, ATM’s and car burglary, etc., due to poverty), increase in syndicate protests and mass demonstrations, street manifestations against governments in many countries in the world, increase in death rate, etc.

If the present economic instability will continue and, eventually, it will be also associated with certain natural catastrophes (such as those resulting from global warming or earthquakes – for example the devastating earthquake from Haiti, on the 12<sup>th</sup> of January 2010, ended in more than 111,000 dead and



194,000 wounded people or the eruption of the Iceland volcano in April 2010), then, it is possible to bring to massive migrations of the populations and even to armed conflicts between those states eager to ensure access to vital natural resources.

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## THE CONSEQUENCES OF THE INTERNATIONAL MIGRATION UNDER THE CIRCUMSTANCES OF GLOBALIZATION

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**Abstract:** *The effects of the international migration constitute a controversial subject because they are difficult to quantify. "The mathematic patterns proposed by researchers for the calculation of these effects start from the theories that aim the global equilibrium and try the aggregation of several elements such as: the level of unemployment, the predictable level of investments, the balance of non-monetary operations, the tendency of exports and imports or the level of wages" (Stoica, 2011, p. 64). The researches on migration consider especially the impact of the migration results, in different regions and countries, according to the specific circumstances and consequences that determine the emergence of this phenomenon. There are analysed aspects common to the immigrants from all the states, but also aspects according to the context from each country and particular aspects regarding the relation between migrants and development.*

**Key-words:** international migration, source-countries, destination countries, illegal migration, European policies

The consequences of the international migration cannot be generalized because both the host countries and the destination countries, from the historic, cultural, size and age structure, ethnic composition, labour market characteristics, system of social security etc. point of view, are heterogeneous. The patterns change according to the circulation in addressing the international migration.

Yet, it is required an analysis of the migration consequences on different types of countries: origin and destination.

### 1. The consequences of migration on the source-countries

The migration of the manpower is encouraged by the governments of many countries, taking into account the next aspects:

- the emigration can offer jobs, many times better paid, for those who cannot find one in their countries;

- in certain countries, the educational systems train a great number of specialists who find a job. In this way, the migration can contribute to the reducing of unemployment and to the diminishing of the social pressure against the governments;

- in some countries, it is encouraged the emigration of the ethnic groups or political dissidents.

For the origin countries, the possibility to rely on their own citizens in the internal production process is reduced. These effects can be different according to: "the profile and the characteristics of the immigrants, the characteristics and the necessities of the internal production system, the access of the immigrants to resources, the availability of the immigrants to deliver or invest their income from migration in the economies of the origin countries" ( Stoica, 2011, p.67).

The economic growth in the poor countries can create jobs, necessary resources for the investment in education, health, infrastructure and social services. In the opinion of some authors "there are three key aspects that affect the relation between migration and development in the case of the source-countries of the international migration: the impact of the (financial) results on these economies, the immediate and long term effects of the emigration (especially of the high qualified and qualified manpower), the management of the migrants who return to their origin country and the rendering valuable of the diaspora" (Wim, 2012).

## **2. The consequences of the international migration on the destination countries**

The immigrants sometimes play an important part in the transformation of the economy of the destination countries, but also in the consumption patterns, in the social systems, in the employment diagram and in the international trade.

The impact of the migrants on the host-societies depends on:

- the regulations and the legislation that refer to immigrants and their integration;

- the access of the immigrants to the labour market;

- the level of development of the destination countries;

- the level of training and the linguistic affinity;

- the political rights;

- the integration of the immigrants (Erdeli, Dumitrache, 2001, p. 153-154).

A consequence that the international migration can have on the destination countries is that of changing the ethnic, racial or cultural composition of the receiving societies. It is important the integration of the

immigrants into the societies of the destination countries in order not to become sources of social insecurity.

At the cultural level, are found profound modifications, the European culture registering a mutation from the meaning of national mutation to that of mixed culture, understood as a combination between the culture of the destination country and that of the immigrants.

As regarding the integration of the immigrants in Europe, there is not a unitary position that has to be adopted for this situation. The authorities, especially the local ones, apply their own approaches to the challenges that concern the integration of the immigrants.

The process of integration of the immigrants into the receiving societies is influenced by: the learning of the language, especially to have access to the culture, traditions and social life of the host-communities. In this regard, the European countries take measures to support the immigrants in learning the language of the host-countries.

The integration of the immigrants into the host-societies is determined by the results that they obtain on the labour market. These results are influenced by the policies of the destination states, in order to recognize the qualifications of the immigrants and the way they are treated on the labour market. The better results obtained at their jobs, offer to the immigrants the possibility of a better integration into the host-society (Lemaltre, 2007, p. 101).

The immigrants have nevertheless the tendency of socialization with their own co-nationals and of little interaction with the citizens of the destination societies. The advantages of these tendencies are those of the reciprocal assistance and exchange of information regarding the opportunities on the labour market, but this also presents negative effects from the integration point of view.

The temporary immigrants tend to be socially excluded because of the unnatural position, their work being badly paid, their social connection being reduced to the members of the immigrant society to which they belong and are socially excluded from the destination countries.

In the opinion of some authors, for the international immigration to exist, there ought to be present three factors: "the request from the destination-countries, the offer from the supplying countries and the networks that connect the request with the offer of manpower" (Stoica, 2011, p. 67).

### **3. The illegal migration**

This constitutes a mediatised subject and represents an important discussion between the governments, NGOs, political leaders and the civil society in the destination countries of the illegal migration.

The illegal migration is approached from two points of view: the compassion towards those who risk their life in order to reach the European continent and the speeches of the extreme right parties in which there is manifested the suspicion towards these immigrants. Sometimes they are presented as criminals who benefit by the work of the Europeans: "as other forms of organized crime, the traffic became globalized. The previously active groups from some regions or routes became geographically extensive with the purpose of exploring new markets. Some of these favoured or formed relations of collaboration, extending their geographical presence and the sphere of the criminal activities. The illegal immigrants and the victims of the traffic have become another good in the wide domain of the criminal commerce with other goods, such as the narcotics and guns or money laundry that generate illicit income or look for reducing the risks for the traffickers" (*New pattern of irregular migration in Europe*, 2002).

The globalization offered new opportunities to the organized crime groups to increase their illicit income (Erdeli, Dumitrache, 2001, p. 129). The human beings traffickers earn at the world level, annually, billions from these businesses. Few important factors contribute to this situation: the emerging of new markets after the collapse of the communist regions in Central and Eastern Europe, the deepening of the world economy globalization, the revolutions in communication and transportation that allowed the traffickers to operate efficiently. The trafficking in human beings (THB) became a working business, the risks taken upon themselves by the traffickers are lower, as a consequence of the effects induced by globalization. According to certain estimations, between 600,000 and 800,000 people are smuggled annually (Idem).

At world level, every year, between 2.4 and 4 million people cross illegally the national frontiers (GCIM, 2005). It is estimated (UNO, ILO – The International Labour Organization, GCIM) that in the USA there are approximately 10 million illegal immigrants and in the EU, their number is about 5 million (representing almost 1% of the total population of this area) (Ibidem). From all these, approximately 500,000 are women from Eastern Europe that practice prostitution ([www.oecd.org](http://www.oecd.org)).

In Europe enter illegally almost half of million people. The illegal immigrants are spread in most of the European countries, forming a group as heterogeneous as their state: illegal entrances, remaining after the period when the visa expired, illegal residence, working without permit, expired residence or working permit (Erdeli, Dumitrache, 2001, p. 151-153).

The eradication of the illegal working is not able to be practically realized, fact proved through the existence of the phenomenon also in the periods of economic decline in countries that carry on a pro-migration policy.

The negative consequences for the states that face this phenomenon are: the violation of the state sovereignty, it represents a serious menace for the

public safety, the association with the organized crime, the terrorism and corruption. The illegal migration can also have positive effects as regarding the labour market from the affected countries, reducing the risk of conflicts on the labour market. The activity of the immigrants on the labour market leads to the maintaining of the big differences between the wages of the qualified and unqualified workers. The illegal immigrants use in a small extent the social infrastructure and consume more goods produced in the destination countries. Thus, they are less costly than the legal immigrants as regarding the public financing, but the income obtained from the taxes collected from them is also smaller. Yet, a part of the population from the European countries benefit by this phenomenon. The European states accept, even tacitly, the presence of the illegal immigrants, offer them jobs, the illegal immigrants do not benefit by social protection, their legal rights, referring to the maximum number of hours worked by a person, are infringed, together with the safety and health at the working place and the attributions that are stipulated in the job description. The illegal immigrants are exposed to the risks regarding the personal security and the duration of their stay in the country of destination.

#### **4. European policies on migration**

In the EU regulations no. 1621/68 it is stipulated the fact that the mobility of the manpower inside a community should constitute for the worker some means that could guarantee the possibility to improve the living and working conditions and to facilitate the social ascension, while the right to exercise his profession in another state cannot be affected by the special conditions that refer to residence. In practice, at the national level, there are many digressions from these provisions.

The EU strategy in addressing the migration is not unitary, the European policies on this matter refer to, first of all, the control of the suppliers, implementation of selective programs that regard the migration or massive regularizations. In 2007, the European Parliament placed under the supervision of the state members the introduction of the blue working permits for immigrants.

There are two ways to immigrate into the states members of the European Union: the delegation of the responsibility toward the employing companies from the destination country and the procedure of selection of the candidates to immigration that is realized by the governmental authorities from the destination countries.

In the first case, the employing companies require the right to work and residence of the immigrants, a standard procedure in most of the European countries. The destination countries can specify knowledge and skills for the

professions the immigrants will practice, according to which they will be accepted on the labour market.

The advantage of these procedures is one that forms the connection between the immigrant workers and the needs of the labour market from the destination country. The access on labour market is also determined by the existence of the real deficit of manpower. In this way, the immigrants are employed quicker, leading to the satisfying of the request for the identified needs and to the moderation of the salary requirement in the domains with scarce manpower. This procedure slows the rhythm of salary adjustment process that could help to generate internal offers for the jobs that register a deficit of manpower.

In the case of the second procedure, the potential immigrants are analysed by considering certain characteristics that can contribute or facilitate their integration into the destination country: age, knowing the language of the host-society for the domains with a deficit of manpower in the host-society. Therefore, the immigrants are assimilated on the labour market as any other citizen of the destination country and they is not provided with job.

The European policy on migration is selective as regarding the access on the labour market of the high qualified and qualified manpower and the restriction of access and the salary rights that are given to the unqualified people. The immigrants that contribute to the economic growth of the destination countries are welcomed and the others are discouraged.

The policies adopted in very many European countries date, mostly, from the 70s and do not take into account the modifications that have appeared in the world economy. At the European Council from Tempere (1999) there was approached the idea of unitary policy for migration and was consolidated in 2004 through the Hague Programme, considering as desiderates the creation of freedom, security and justice zones inside EU.

The European Commission, offering an image on the evolution of the debates related to the European policies on migration, has released, during the last years, proposals of directives such as: the statute of the residents that come from non-EU countries, the access of the researchers, the family reunion, the fighting against the illegal migration. In 2005, the Commission created the Communication on Migration and Development.

Considering that the European policy on migration has to be protected as a partnership between the states members, the European Commission adopted the Communication on common policy on migration in Europe: principles, actions and instrument, proposing:

- the strengthening of coordination and coherence of the European Union policies for the states members between the levels of government and the different domains and the increasing of transparency by consulting the relevant participants;

- the realization of the methodology common for the states members regarding the development of the migration patterns and the definition of the objectives for the implementation of the common principles and the concrete measures;

- the projecting of the monitoring and evaluation mechanisms for the realization of the annual political analysis and the recommendations made by the European Council according to the report of the Commission that refer to the situation of migration seen at European level. A fundamental priority of the European Council is that to respond the challenges and opportunities of globalization. In this respect, the European Commission proposed ten common principles to establish the future evolutions from the domain of the common policies related to migration, the mechanisms and the instruments intended to the strengthen in the coherence of the policies and the improvement of the migration management.

The ten common principles were grouped on three main fields of the EU policies: prosperity, solidarity and security.

One of the essential instruments for the control of the migrants is the externalization, such is the delegation towards the non-EU countries of certain control functions at the frontiers and the delegation of the responsibilities associated to these functions.

Another instrument for the management of the migration in EU is the recovering and readmission policy. In the Hague Programme it is mentioned that "the migrants who no longer have the right to stay in EU must return in their origin countries, voluntary and obligatory" (Erdeli, Dumitrache, 2001, p. 151-153).

Nevertheless, the inter-European mobility is reduced, even if the EU policies try to stimulate it by establishing some common rules for the social insurance and employment, for the encouragement of the students' mobility, for the financing of the researching programmes etc.

In the opinion of some specialists, the European policy in the domain of the immigrants, in the future, will be characterized by the next features:

- the sustaining of an attitude of easiness in every domain of activity, the manpower will be treated differently according to the area of origin, the degree of qualification, the perspectives of integration into the destination country;

- as concerning the areas from where the immigrants come, the people who arrive from the zones with increased extremist potential, with a culture more different from the occidental one and from the people who can induce disturbing elements in the destination countries, will be rigorously treated and supplementary controlling measures will be taken (Rusu, 2003, p. 134-145).

Because the migration of the manpower presents implications on the social and economic policies, the states members of EU should implement integrated policies that ought to aim for the long term development. The



policies based on the assumption that the immigrants can be brought when needed and then sent back, cannot be applied anymore. The destination societies and their economies are permanently adapted in the presence and even become dependent on their services.

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## THE PROBLEMATIC INTEGRATION OF DISABLED PEOPLE IN THE LABOUR MARKET

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**Abstract:** *The inclusion of people with disabilities in the labour market is one of the problems of contemporary society. The number of people with disabilities employed is low. There are various causes: jobs that are not go with the qualifications, skills and needs of the disabled person, poor educational and vocational training, discrimination in employment on the grounds of disability, the employers avoid the integration of people with disabilities, many of whom prefer to pay fines rather than employ them. As a result of the study made at the Social Inclusion Center, it follows that the projects of inclusion of disabled people are very effective and important because after the activities of the project, the persons belonging to the target group were transformed from passive recipients of social services and burden for their families into active citizens integrated in the labor market.*

**Key words:** *inclusion, disability, integration, job, disability.*

### Introduction

In the context of the Lisbon Strategy, each member state of the European Union has to speed up the efforts to increase the employment and to endorse the sustainable development and the modernization of the European Social Model, based on economic dynamism and social cohesion.

The objectives and priorities of the European Employment Strategy aim an inclusive labor market by helping the disadvantaged people to enter the labour market. . The Integrated Guidelines for Economic Growth and Jobs renewed in 2008-2010 consider, among other things, the creation of inclusive labor markets for them, through measures such as assistance in seeking employment and providing social services.

The needs of people with disabilities are stated by NAPD statistics which show that in Romania live 549,772 adults with disabilities (approximately 2.5% of the population) and only 4% of disabled people have a job nationwide. Only 3.1% of the beneficiaries of the employment programs of the County Agency workforce are persons with disabilities.

The problematic situation of disabled people exists because they are a group of people with a clearly disadvantaged position compared to other

categories of people. Their socio-professional inclusion is one of the major problems of contemporary society and it can be solved only by the common effort of all people of good faith from the political, social, business, science, culture areas.

The civilizing grade of society is largely determined by the attitude towards the disabled people. Creating the conditions for education and training, socio-professional adaptation and social integration of the persons concerned is usually an important objective of any state and global community.

The theme can also be presented by the pressing differentiation of people with disabilities, which is determined by the individual-typological features of the abnormal people and ensures the achievement of their maximum knowledge possibilities. The differentiation of people with disabilities is a fundamental problem of defectological science, a complex action that is performed interdisciplinary (medicine, psychology, pedagogy, etc...), focusing on the particularities of individual psychophysical development. The problem of disability among children and young people is one of the most acute not only in the field of maternal and child care but also in the social life of the country.

The purpose of this paper is to study the problem of the labor market inclusion of people with disabilities both socially and in legislation and also their training, their ability to work, the problems faced by people with disabilities on the labor market integration.

Many barriers in society are preventing the accommodation of people with disabilities in social active life through full participation. The changes in society should lead to the break of the barriers and to allow the integration of the people with disabilities into society by creating equal opportunities for having a active life (by finding a job through their participation in various activities to communicate and to easily express their views through any media in front of a specific audience, etc.

### **1. The social inclusion of disabled people- national and European context**

Social exclusion and inclusion are multidimensional concepts. The economic dimension - income and employment - is undoubtedly crucial. Urban, social, cultural and political dimensions must also be taken into consideration. One may be economically accepted but may be also excluded in urban terms if he lives in an area considered to be very bad. (Duminica, Cace, 2007, p 22)

The "social exclusion" term has been widely used since the 1980s. Public authorities both at European and governmental level are now directly involved in the development of anti-exclusion policies. The implementation and evaluation of such policies are complex steps. The difficulties are directly related to the diversity of social groups affected by poverty and exclusion periods and

also by the fact that their repetition frequency is varied. In addition to these, it is included a different type of exclusion. However, focusing on the development of opportunities for a better participation of individuals in various activities of the community, the concept of "social inclusion" has begun to spread little by little. (Duminica, Cace, 2007, p 23)

The year 2000 is an important moment in the evolution of social policy through the development of the Lisbon Strategy, in which is set a ten-year goal of the European Union, represented by the transformation of its economy into the most competitive knowledge-based economy. The Social Policy Agenda that was adopted in the same year, has taken over those specific objectives and strategy elements related to social policy and it has transformed them into a 5-year action program, which is the current social policy.

A global strategy is foreseen to enable the EU to achieve this objective:

- preparing the transition for an economy and a knowledge-based society;
- promoting the conducive economic reforms to highlight the competitiveness and innovation;
- modernizing the European social model by investing in human resources and combating social exclusion;
- maintaining a fair dose of macroeconomic policies for sustainable growth. (Duminica, Cace, 2007, p 26)

At present, the EU Sectorial Operational Programme Human Resources Development (SOP HRD 2007-2013) has as priority ax the promotion of social inclusion. The major areas of intervention under this priority ax include: development of social economy, development of a network of integrated social services, improvement of the access and participation of the vulnerable groups in the educational system and the labor market, promotion of the equality on the labor market, and transnational initiatives on the inclusive labor market.

Europe can succeed if it acts collectively, as a Union. We need a strategy that will allow us to emerge stronger from the crisis and to turn the EU into a smart, sustainable and inclusive economy, marked by high levels of employment service, productivity and social cohesion. Europe2020 provides an overview of the European social market economy for the twenty-first century. (Studiu privind incluziunea socială pe piața muncii, 2011, p.18).

Europe 2020 suggests three priorities of mutual support:

- Smart growth: developing an economy based on knowledge and innovation;
- Sustainable growth: promoting a more efficient economy in terms of resource use, more ecologic and more competitive;
- Inclusive growth: promoting an economy with a high rate of employment, ensuring social and territorial cohesion.

By concluding the EU Association Agreement (European Agreement), Romania has been irreversibly committed to European integration. The national strategy for Romania's accession to the EU, adopted at Snagov in June 1995 marked the procedural steps and actions that were to be undertaken in the process of Community structures. The Accession Partnership signed by Romania is now a key element of the enhanced pre-accession strategy, setting out the principles, objectives and priorities on short and medium term, mobilizing all forms of Community assistance in a single framework. Situated on a big preparation stage for accession, Romania participates actively in the process of analytical examination whose aim is to harmonize the national legislation with community rules. (Duminica, Cace, 2007, p 39)

In retrospect, in recent years there have been developed a number of specific projects that intend to develop the social inclusion and to combat social exclusion. There were several institutional and legislative changes having a direct role in the process. The following table shows a representative selection of measures in the field.

**Table no. 1 - Measures for social inclusion**

|  |                                  |  |
|--|----------------------------------|--|
| The establishment of Governmental Commission Anti-Poverty and Social Inclusion           | Government Decision no. 705/2002 | The objectives of the institution were: the development and implementation of the National Anti-Poverty and Social Inclusion plan, supervising the dynamics of poverty, evaluating anti-poverty effects of social policy measures promoted; developing the ability to identify and to resolve the social priorities. |
| Giving minimum living wage   | Law no. 416/2001                 | The law provided minimum living wage in accordance with EU regulations   |
| The approval of the National Anti-Poverty and Promotion of Social Inclusion plan in 2002 | Government Decision no. 828/2002 | This document assumed a new approach to the social policy, which connects three interrelated policies: economic policy, employment policy and social policy.   |

|   |                                |  |
|---|--------------------------------|--|
| The prevention and combat of social exclusion | Law no. 116/2002               | The objective is to give the guarantee of the effective access to the law, particularly to the young people, to the fundamental rights and the establishment of some measures to prevent and combat social exclusion and mobilizing the institutions responsible for it.     |
| National system of social work regulation     | Law no. 47/2006                | Here is defined the process of social inclusion as "multidimensional set of measures and actions in the fields of social protection, employment, living, education, health, information, communication, mobility, security, justice and culture to combat social exclusion." |
| MMFPS organization and operation              | Government Decision no.11/2009 | It establishes the coordinating role of the Ministry of Social Inclusion Policies  |

It is estimated that in recent years social inclusion policies and measures have seen a clear improvement due to the alignment process with EU standards and practices but also due to the economic growth, which has allowed the extension of funding for certain measures, programs and social services. The opinions expressed on the evolution of social inclusion policies have a common feature that refers to a way to improve the system by legislative and organizational changes. These changes are described through the opening of the decentralization process, creating new institutions, partnerships with civil society in order to achieve objectives or to implement programs and projects. (Gallup Romania, 2009, p 16)

Thus, Romania is considered to be on the way to please the political criteria in their integrality; there have been made significant progress in creating a viable market economy, although it still requires substantial efforts.

## **2. Characteristics and definitions of the following concepts: "disability", "disabled"**

In Romania, the term "disability" has come into the current vocabulary in the last years. The use of this word, and other terms related to the evaluation and social intervention process is empirical; no dictionary contains yet any definition of specific terms. Regarding the Romanian legislation, it is still use the term "disabled person" instead of the phrase "person with disability". To make

matters even more complicated, we use a term ("disability") which does not appear in any dictionary. International theory and practice require us to do this.

World Health Organization has proposed the following definition of disability: "Disability is represented by any restriction or lack (resulting from a disability) of capacity (ability) to perform an activity in the manner or at the level considered normal for a human being." Analyzing the model proposed by the World Health Organization, we notice that the Romanian language does not have an equivalent term for "disability". The term "invalidity" used frequently by experts (doctors) to recover the work capacity, is increasingly challenged by the persons concerned. The reason for this challenge lies in its semantic load: the word is composed of the prefix "in" - element of composition with negative and privative meaning, forming nouns, adjectives or verbs (DEX, 1998) and the adjective "valid" - healthy, fit for an employment. (DEX, 1998) So, the term "invalid" means a person who lacks the capacity to work, a concept which is not far from reality. (Study Group of Disability Problems, 2001, p 17)

Etymologically speaking, the term "disability" has its origin in English, meaning a type of game in which two people participate in placing a bet on one of their possessions as stake and their value for money is assessed by a referee. In the traditional sense, the term "disabled person" was synonymous with "crippled", including those who, due to sensory, motor or intellectual deficiencies, were having lower possibilities of acting all the time or during significant times, in comparison with the so called "normal" people. In consequence, there were used the concepts of "normality" and "difference"; "the normal" is frequently identified and confused with what is common, having the highest frequency in the community, in the society. (Manea, 2000, page 25)

In Romania, the term "handicap" has recently come in the specialized literature and has been used more often after 1989 in the current vocabulary having a very complex semantic evolution.

"Handicap", "disabled", "person with disability" are terms used differently, understood in different ways, misunderstood or reduced to absurdity. Usually, the handicapped tag is applied to those who had incapacitating morphofunctional disorders in childhood, youth or before starting work. In Romanian, the term "handicap" has become almost synonymous with the concept of "impairment", "disability", "incapacity", "invalidity", so we almost do not feel any semantic difference when instead of "hearing deficiency" we say "hearing impairment" or in semantic term of disability from the simple disadvantage "to" disease "or" deficiency ". (Rusu, Hîncu, Carantină, Leca, Teodoru, 1997)

There are many types of disabilities which a person has, and the severity of such an injury can influence the behavior and relationship with this person. About 3% of the Romanian population consists of people with disabilities, according to the National Authority for Persons with Handicap (NAPH) statistic

data from 2010. From this figure, half are assigned to profound handicap category.

There are four degrees of disability: mild, moderate, severe and profound. According to Law no.448 of 2006, the adult with disability benefits by the following social services:

- a) monthly allowance, despite the income:
  - 1.amounting to 202 lei for profoundly disabled individual;
  - 2. amounting to 166 lei for severely disabled individual;
- b) additional monthly personal budget, despite the income:
  - 1. amounting to 91 lei for profoundly disabled individual;
  - 2.amounting to 68 lei for severely disabled individual;
  - 3. amounting to 33.5 lei for moderately disabled individual . (Law no. 448, 2006)

There are ten types of disability: 1. physical, 2. somatic 3. auditory 4. visual, 5. mental, 6. neuropsychiatric 7. associated 8. HIV / AIDS, 9. rare diseases 10. more.

In conclusion, it can be said that the deficiency can cause a disability which, in turn, leads to a disabled condition that makes the disabled person to pay penalties of living environment; this environment can integrate, tolerate or reject the disabled person; hence, a number of implications both in the balance of the person's internal life and in the relations with others, which leads to the inclusion of a disabled person in a vicious circle that sometimes can be quite complicated in the process of an harmonious and balanced development and structure of its personality.

### **3. Labour market integration of people with disabilities**

Labor market inclusion of people with disabilities is one of the problems of contemporary society. The number of people with disabilities employed is low, both because of job offer, which is not in harmony with the qualifications, skills and needs of the disabled person and their poor educational and vocational training . There are still showed phenomena of discrimination in employment on the grounds of disability, and the access to the physical environment and information is reduced.

The employers are not responsible for the public policy and avoid hiring people with disabilities considering them to be more burdensome than of help. Many of these employers prefer to pay fines rather than employ them or to purchase goods or services from protected companies to the amount of an owed debt as required by Low 448 2006 on the protection and promotion of the rights of people with disabilities.

Sheltered employment are created especially for the purpose of hiring people with disabilities either as companies or independent departments as



part of the normal companies that also offer socio-professional training or recovery, as an intermediate stage of transition to a normal job. Creating these protected companies in Craiova has not made easier the inclusion of a large number of people with disabilities on the employment service. At present there are a total of twelve sheltered companies in Craiova which some work only as sheltered workshops while others do not want to hire people with disabilities because they have already a minimum number to integrate in the sheltered companies and others do not need employees because they do not have a self-extended activity.

People with disabilities are exposed to a high risk of marginalization on the labor market through the following specific needs:

- have limited access to education and training; special education provides low educational level and low employment opportunities that do not have a high demand in the current context;
- have little social community services developed in the public or private sector;
- do not receive suitable employment services in order to facilitate labor market (counseling, training) and are not benefiting from the employment policies of the NEA, because they do not take into account unreported unemployment and the disabled people are not motivated to enroll in the databases of the agencies;
- people with disabilities are characterized by an extremely low rate of employment and most of them are interested in getting a job.

However, there has been a positive trend in the employment rate of people with disabilities for the last years. Through the Sectorial Operational Programme Human Resources Development - SOPHRD, 6 axis - Promotion of Social Inclusion, Major Area of Intervention 6.2, the improvement of access and participation of the vulnerable groups in the labor market has sponsored several projects to facilitate the labor market integration of the people with disabilities.

The project "Integration in the labor market: greater opportunities for people with disabilities" has been enforced from the autumn 2011 till present by COLFASA Association and has been financed through the Sectorial Operational Programme Human Resources Development. The overall objective of this project is to facilitate the access to employment market for the people with disabilities in order to avoid social exclusion, marginalization and discrimination, by establishing a network of Social Inclusion Centre. This network ensures equal opportunities in the labor market integration through employment opportunities, accompaniment and support services, awareness of the people from the labor market and the community about the abilities, rights and social benefits of the participation of the disabled people in the labor market.

The specific objectives to achieve the overall objective are:

- Provision of integrated social services of disabled people by setting up Social Inclusion Centers.
- Facilitating the access to employment of a number of 270 disabled people
- The inclusion of the target group in training programs.
- Making a change in the attitude of employees and employers regarding the integration of disabled people.
- The implementation of accompanying measures to identify and maintain a job.
- Participation in training programs to develop basic skills and qualifications for disabled people.

Disabled people are often perceived negatively by employers and have problems of integration or reintegration in the labor market. They need comprehensive support, adequate inclusion and assistance conditions in overcoming their current problems. Thus, in this project are developed and implemented proactive measures that enable them to develop their self-esteem, confidence in their own strength to overcome the psychological and social barriers. Creating solutions that encourage local communities and employers to join the commune activities in order to combat marginalization and its effects represents an important solution.

Following the implementation of the project, people with disabilities, which are part of the target group, were trained up for jobs required by the labor market that are available for them, by taking into account the type and degree of disability. They also benefit from employment facilitation and by establishing a partnership between the Social Inclusion Centers and employers, the beneficiaries undergo an internship inside the companies by offering them a stable job. As a result of the activities of the project, the persons that belong to the target group are transformed from passive recipients of the social benefits that are also a burden for their families into active citizens in the labor market.

In my research project conducted at the Social Inclusion Center, I present ten case studies which can be examples of good practice. The beneficiaries questioned were supported and accompanied in the labor market integration and they also benefited from services such as vocational training courses, mediation and inclusion in labor market, career guidance and permanent counseling for people with disabilities and also for their family members.

### **3.1 Methodology Research. Case Studies**

The research project had as main objective the examination the employment and integration level of disabled people, beneficiaries at the Social

Inclusion Center of Craiova. It is both descriptive (designed to produce/give information about social reality) and explanatory (aimed to test certain hypotheses). (Chelcea, 2004, pp. 92-96)

I observed the main objectives:

- Analysis of the labor market integration of disabled people supported by the Social Inclusion Centre of Craiova;
- Identifying the problems faced by the disabled people on the process of their integration in the labor market;
- proposals for improvement / introduction of social services to promote and improve the existing social services in the Social Inclusion Center of Craiova;
- proposals for legislative changes concerning the protection and promotion of disabled people, orientation, training and employment .

Based on information learned up to this level of analysis, I studied the following assumptions:

- If the degree of discrimination of disabled people is reduced then the chances of integration into the labor market increase.
- The interest of disabled people to find a job is as higher as the chances of socio-professional integration.

Given the complexity of disability-specific problem I have chosen several studies techniques to capture some important aspects regarding the social integration of disabled people. To illustrate and explain the premises supported in this paper I have chosen the Social Inclusion Centre of Craiova, COLFASA Association because I believe that is one of the most representative associations of the city with a total of 165 people registered and the main activity is the integration of the beneficiaries in the labor market.

I used the documentation technique, social history and sociological observation to realize the proposed objectives and to test the hypotheses from where I have started the study. Each of these techniques has its importance and has been used to emphasize a certain aspect of the study. I therefore consider it appropriate to define each instrument used and to emphasize the way that helped me to achieve my goal: to analyze the degree of employment and integration of disabled beneficiaries of the Social Inclusion Center of Craiova.

The definition observed seems to be simple: to notice is to know, to examine an object or a process, to make findings and remarks (critical) of what you have carefully seen. This is the meaning of the term "observation" in the common sense. (Chelcea, 2004, p 177)

In the "Dictionnaire de la sociologie", it is stated: "Sociology is not limited to a passive recording of facts and phenomena. Sociologists build their observations. The describing facts and finding results appear only at the end of an empirical and theoretical process, produced by the study of reality; the observation is both process and outcome. "(Raymond, 1996)

Observation is the main technical sociological investigation because it provides valuable information and is an essential source data and also a final evidence of the value and the significance of the reached conclusion. It is a technique and also a sociological stage approach and its ignorance lay in the origin of empirical and formalist findings, and is a sign of a professional immaturity.

The observations that I made , have endorsed not only the activities carried out by the social workers and the psychologists in the approach of the socio-professional integration of beneficiaries but also by the attitude and willingness of the latter on integration.

After a direct observation, the documentation is the main second source of data and information enabling a direct contact with the reality. It is the most accurate technique that offers the possibility of statistical and mathematical analysis. Although it is an essential technique, it is not a single source. Any document gives us an overview of the population being built by the people from a particular social context and thus is marked both by the personality of the author and by the specificity of an era, since it aims to preserve for the future the meaning of information depending on the objectives pursued by the author.

Social consciousness can not be studied in depth as social existence only via appropriate techniques or means that put us in front of the most significant and representative data. The status of social documents is different from one science to another: in the historical studies, the documents occupied the main rank whereas in sociology the documents fulfill a documentary function.

At the Social Inclusion Center I have examined the following documents: status, chart, job description, responsibilities, statistics, activity reports, reports of labor market analysis, collaboration agreements with various institutions and companies. I have also analyzed some documents concerning the participants: social investigation, psychosocial assessment report, individualized plan of mediation, medical history and psychological sheet.

Social history includes information about factual data and interpretation of their significance. The structure includes:

- ✓ information about the individual identification (name, address, phone, marital status);
- ✓ drawing motivation;
- ✓ presentation of the individual family;
- ✓ data on the health of the individual;
- ✓ data on the education of the individual;
- ✓ data on the economic situation of the individual;
- ✓ data on the community resources necessary to support the individual;

✓ observations and recommendations. (Rusu, 2002, p 77)

It is employed both observation and documentation by using various sources of information concerning the client in order to realize a social history.

For the 10 cases examined I used a complex social history through which I have aimed to achieve all aspects of socio-professional integration of disabled people (family, health, vocational training, employment, current situation). The discussions with the disabled people and the data collected during the observation and documentation helped me to gather all the information I needed. I tried to sum up the information without giving too many details because the objective is not to write biographies, but to highlight the level of employment and integration of disabled people, beneficiaries at the Social Inclusion Center of Craiova and to propose solutions to improve / promote their social and professional integration.

### **3.2. Research results**

People with disabilities are seen as fragile, unable to provide a service that brings profit to the employer. Therefore, their integration into the labor market and their inclusion in society is often regarded as impossible or unnecessary.

But like any human being, people with disabilities have the right to social and professional integration that offer them the chance to achieve an optimal degree of independence. But to be integrated, they need to acquire skills in order to make them to find a job.

Therefore, the experts from the Social Inclusion Centre have worked closely with the beneficiaries on social inclusion. Over 100 of the 165 enrolled beneficiaries at the center were counseled by psychologists and social workers; there were also conducted both individual and group counseling on various topics such as: creating a curriculum vitae, a letter of intent, preparing the beneficiaries to go to an interview, role plays to participate in the interview, motivating the beneficiaries to integrate in the job market , talks on jobs in the labor market, training the beneficiaries to integrate in the labour market and modalities of exposure of the individual to search a job , socialization and formation of the group cohesion by going out in the park, at movies, at theater or visiting museums.

These activities have yielded results and the beneficiaries have become more sociable, enthusiastic and aware of the need for social implication. They have made friends and have begun to realize that do not have to be socially isolated, and that everyone is entitled to a chance to be effective and not defective.

An addition brought to the beneficiaries by the COLFASA Association through the Social Inclusion Center was to qualify these people in various professional fields and to provide them with the integration in the labor market. By doing this, eighty-eight persons with disabilities were initiated into information and communication technology and also the same people were qualified in the following programs: fourteen beneficiaries were qualified in therapeutic massage, twenty in manual packaging, twenty-six in work trade and twenty-eight in food.

Table no. 2 - Professional qualification of beneficiaries

| Nr. crt. | The field in which they were qualified    | Number of beneficiaries |
|----------|---|-------------------------|
| 1.       | Technology and Communications Information | 88                      |
| 2.       | Therapeutic Massage                       | 14                      |
| 3.       | Manual Packing                            | 20                      |
| 4.       | Trade Worker                              | 26                      |
| 5.       | Food Worker                               | 28                      |

From the analysis of the documents at the Social Inclusion Center showed that social workers accompanied a number of 160 beneficiaries from the 165 enrolled at the center to job interviews. This thing demonstrates the involvement and interest of the center staff to integrate all the beneficiaries without making any discrimination on their disability, skills and abilities. While it is clear the interest and effort of the center staff to give all beneficiaries that are interested in a job a chance, so far there have been integrated in the labor market a number of 28 beneficiaries. In the following table is exposed the situation of the accompanied beneficiaries to job interviews, the number of the employed and the employment areas.

Table no. 3 - Beneficiaries accompanied to the interview and beneficiaries integrate in the employment market through CIS

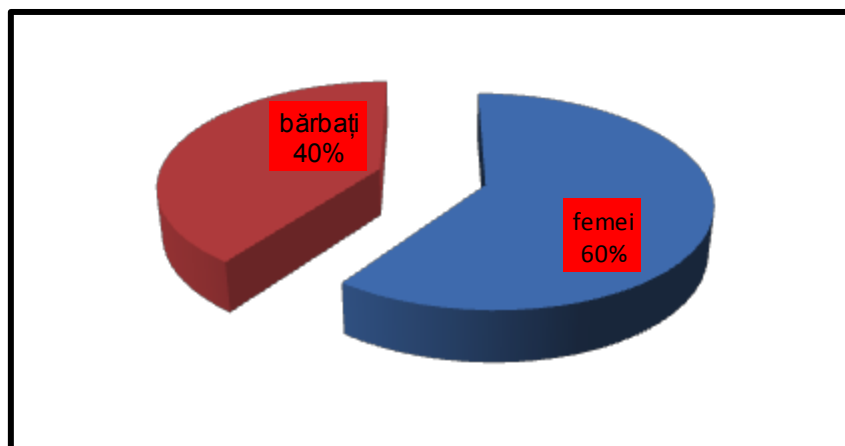
| Nr. crt. | Domain  | Number of beneficiaries accompanied to the interview. | Number of beneficiaries integrated in the employment market |
|----------|---|---|---|
| 1.       | Media advertising   | 10  | 5   |
| 2.       | Textile industry  | 22  | 7   |
| 3.       | Security services   | 7   | 2   |
| 4.       | Trade   | 23  | 5   |
| 5.       | Ice production and distribution                             | 9   |   |
| 6.       | Sorted materials  | 10  |   |
| 7.       | Mnufacture of traveling requisitions and fine leather goods | 10  | 1   |
| 8.       | Textile laundry   | 4   |   |

|       |  |     |    |
|-------|--|-----|----|
| 9.    | Pastry/Bakery  | 10  | 1  |
| 10.   | Cleaning   | 30  | 3  |
| 11.   | Aluminum and PVC Joinery                               | 3   |    |
| 12.   | Sales service  | 7   | 1  |
| 13.   | Massage  | 1   |    |
| 14.   | Car washes   | 6   |    |
| 15.   | I.T.   | 4   |    |
| 16.   | Health   | 1   |    |
| 17.   | Secretariat  | 1   |    |
| 18.   | Upholstery   | 1   |    |
| 19.   | Welfare  |     | 1  |
| 20.   | Manufacture of motor vehicles                          |     | 1  |
| 21.   | Car service  | 1   |    |
| 22.   | Repairment and maintenance of the transport equipments |     | 1  |
| Total |  | 160 | 28 |

I have extracted several important data on persons with disabilities from ten case studies in which are presented disabled people that have been socio-professional integrated.

Firstly it is noted that 60% of beneficiaries presented are women and 40% are men. This shows that women are more enthusiastic and more eager than men to participate in social activities. Although it is not a big difference, the men with disabilities are more comfortable sometimes; they are pleased to live only from the compensation they receive for their disability. Women are more responsible for their families, parents and children and are not content to receive permanent help from others; they want to be independent, to realize a monthly income and to be effective.

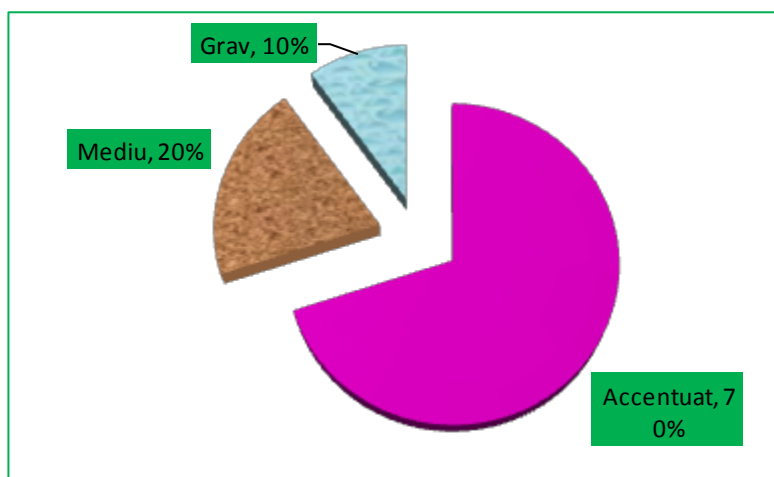
Picture no. 1 - Distribution by sex



Regarding the type of disability they face, 20% of people presented have an average degree, 10% have severe degree and 70% have high degree of disability. A small weighting of the persons with disability of medium degree is explained firstly by the fact that nationally, according to statistics provided by the Department for Persons with Disabilities, from 31 March 2012, the number of disabled people who have disabilities of moderate degree is 9.8%, while 32% (over 200,000) have a severe disability degree and more than 57% (357 500) have a profound disability degree.

An important aspect is that people with profound disabilities that hold the largest weighting have outstanding working capacity up to 50%. It is also presented a case with profound disability that has been integrated in the labor market despite his locomotor disorders. This beneficiary moves only by using a wheelchair, yet despite this thing that limits his chances of integrating in the labor market, he wanted very much to have a job and he succeed to integrate in the employment of textiles.

Picture no. 2 - Type of disability



A significant aspect is represented by the marital status of the beneficiaries presented as examples of good practice. 80% of these are unmarried, while only 20% are married. This can have several causes. It is hard for a disabled person to find a partner because most of the times, people with disabilities are seen as incapable and useless. At the center I spoke with a disabled person on this subject and he told me in a detached manner that he does not want to have handicapped children and does not want his illness to perpetuate. I believe that the people with disabilities are more realistic, sometimes emotionally stronger, more sensitive, and they know to appreciate what they get. If the disability issue can be easily passed, you can discover that a disabled person offers much more than a normal person.

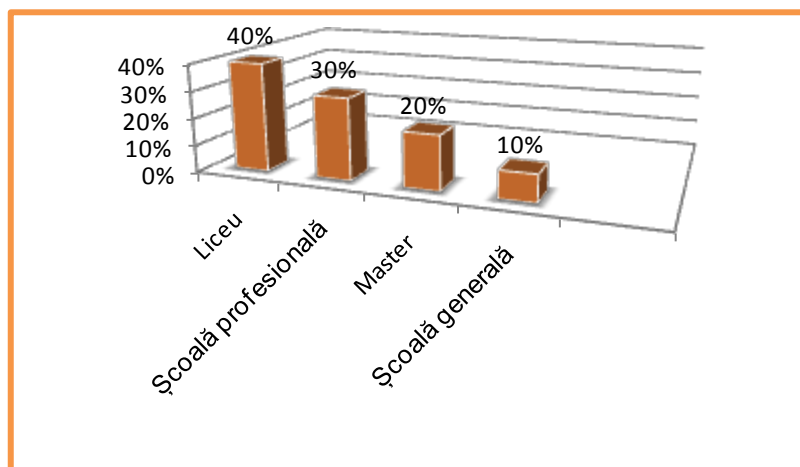


Regarding the level of education completed, the beneficiaries have a different level of education: 10% of them have graduated from a secondary school, 40% have completed high school, 30% have attended a vocational school and 20% have attended university. For the cases presented, high school graduation predominates because these people are the ones who have successfully integrated into the labor market and the education has clearly contributed to this. Generally speaking, from the documents studied at the center results that about 20% have completed university courses and 30% high school. This thing is explained by the fact that the disabled people had a major contribution in a negative aspect. The educational rights and schooling of those persons have been restricted and the education of the majority of the young people with disabilities around the world has ended in mid- adolescence according to UNESCO.

An important role was played by their parents; the disabled people were supported both financially and morally by their parents. The main reason that these people are excluded from any form of education is because of their families and society opinion that the effort to educate them is useless, the education being seen as an unnecessary investment. Even when the education systems exists, the given services and attention do not allow people with disabilities to have the same level of education as non-disabled people.

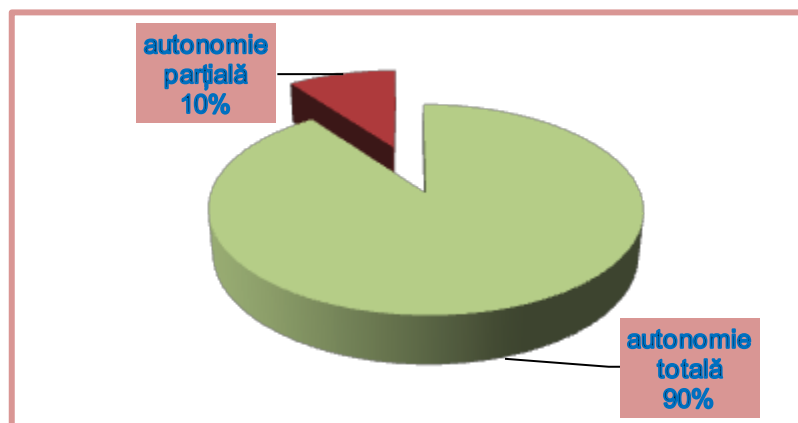
Unfortunately, some graduates of secondary school with severe disabilities are not enrolled into another form of education or professional training and they often remain in the family, obviously causing them a social regression.

Picture no. 4 – The level of education completed



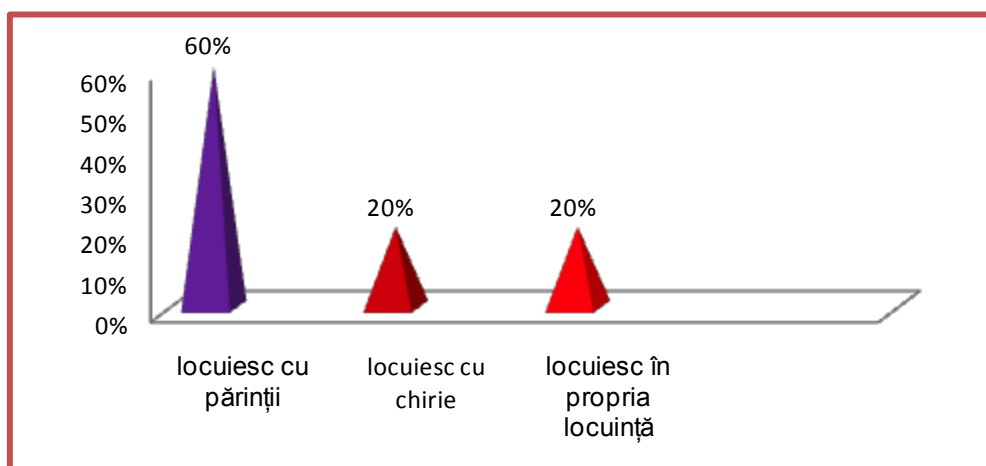
As for the autonomy and functional state, 90% of the people presented have full autonomy in carrying out the activities and only 10% have partial autonomy. This is explained by the facts that at the Social Inclusion Centre were included in general people that were looking for a job, able to perform various activities. People that have a profound disability and require an attendant, do not have residual work capacity and are not interested in appealing to the Social Inclusion Center services. However it is remarked the fact that one case of the ten presented has partial autonomy in carrying out daily activities and has been integrated into the labor market. He is a beneficiary dependent on a wheelchair but is very ambitious and he fends for himself in most situations. He has wanted to be financially independent and useful. However he was integrated into the labor market, having activities suited to his skills and using only vehicles with platform.

Picture no. 5 - Autonomy and functional status



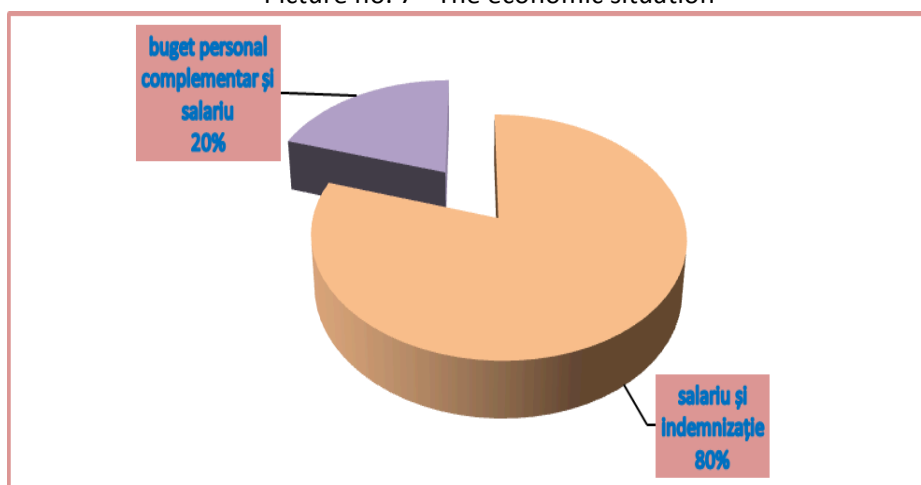
Regarding the social situation, 60% of the beneficiaries presented live with their parents, 20% live in a rented accommodation and only 20% have their own home. It is noticed that most of the people presented live with their parents. They can not afford to rent a home, especially buying one. This thing is understood from the huge gap between the income of such persons and the existing costs. People produce goods and services because they need to consume. Consumer needs always exceed their satisfaction possibilities; the available resources are always insufficient. Therefore, people should take rational decisions to use the existing resources. This explains the inability of most people presented to get a house. They work to ensure their daily life and individual necessities (food, house, clothing, education, healthcare, culture, etc).

Picture no. 6 - The social situation



Regarding the economic situation of the beneficiaries presented, 80% of them receive the compensation that is granted to the persons with severe and profound disability. They also get a salary from the performed work; 20% of them get a salary and a complementary personal budget that is granted to the persons who have a moderate disability.

Picture no. 7 - The economic situation



## Case Study

### I. Identification data

*Name and surname:* S. L.

*Gender:* female

*Date, place of birth:* 30. 03. 1984 Mun Băilești

*The degree and type of disability:* Profound, Associate

*Marital status:* single

### II. Professional History

*Education:* University of Petrosani, Master's degree with specialization Management and Quality Assurance; The West University of Timișoara, Bachelor Degree, specializing in Social Work.

*Occupation:* Employee

*Career history:* Social-worker volunteer at Red Cross (April 2010) Nanny (15.09.2009-01.02.2010) Social-Worker-Volunteer at the Information and Counseling Centre St. Ecaterina-Vasiliada (01.08.2008-15.01.2010) , Assistant public relations and communication at the NGO Enter Brașov (12.03.2009-15.04.2010) Advisor volunteer at Duomed Timisoara (01.10.2007-05.06.2008) social worker volunteer at Băilești Hall (01.04.2007-30.09 .2007) Social Worker-volunteer at the Christian Hope House, Băilești (01.08.2006-01.09.2007) social worker volunteer at DGASPC Dolj (01.07.2006-01.08.2006).

### III. Autonomy and functional status

*Daily activities:* The beneficiary can independently perform the daily activities (personal hygiene, dressing / undressing, serving and feeding, mobilization, walking inside the house, media use)

*Instrumental activities:* The beneficiary does independently the instrumental activities (cooking, household activities, revenue management, making purchases)

### IV. Social and economic situation

*Income, assets:* Salary and allowance for disabled Grade II in the amount of 234 RON;

*Legal status and type of house:* The beneficiary lives in a rented apartment in Craiova, his legal residence being in Băilești - his parents' apartment.

### V. General comments

LS, is 29 years old and was diagnosed with epilepsy, cerebral palsy and a operated aortic coartation. He works for the Vasiliada Association as a

social worker in a day care center in the city Filiași, Dolj County. He came to the Social Inclusion Center Craiova in December 2011, coming across it from the local press. He has graduated a technician masseur course. He has received psychological and training counseling, participating in several group meetings and various activities organized by the social workers and psychologists from the center. The beneficiary has also attended several job interviews in various areas such as social assistance, secretariat and massage. To take part in these activities, he has come from distance of 70 km between his place of residence and Craiova city. He now lives in a rented apartment in Craiova.

The beneficiary says about the Social Inclusion Center: "Shortly after the opening of the Social Inclusion Center in Craiova I have found about its existence from an ad in the local press. I am also the beneficiary of another center of disabled people in Craiova which belongs to Vasiliada Association.

Being a university graduate in social work and seeking a job in this area I enrolled in the SIC. At first I had several meetings with the social worker and the psychologist to set down my entry documents required. After that I came weekly at the group meetings, philological and social counseling , where I was able to develop better self-awareness skills, personal and interpersonal development , emotional support, easily communication with persons with disabilities - future employee. I have also learned how to approach a meeting with people who are experiencing the same problem as me, participating in various social activities and communication, visits to various institutions such as the Oltenia Museum , the University of Craiova, outdoor trips at theater, at cinema and in park .

Attending several meetings for interviews with employers have responded to my expectations and I have formed a clear picture regarding "be effective, not ineffective" in social life.

During this project in the SIC, I have taken a therapeutic massage technician course where I had the opportunity to learn many more things such as: massage techniques, how to deal with a customer, a little from the medical area but enough to do the massage correctly and efficiently.

I'm so glad, because I have known people like me, I managed to overcome professional depression state in a defective system in which is very important for me to do social work because I identify myself with what I do, but at the same time it means volunteering because in Craiova we have a chronic lack of such employment. "

### **Conclusions**

Social inclusion is about changing attitudes and practices from individuals, institutions and organizations so that all people, including those perceived as "different" due to deficiencies, ethnic appearances, socio-economic

conditions of life, could be able to contribute and participate equally in the life and culture of the community they belong to. From an operational perspective, social inclusion can be described as non-discrimination plus positive action.

In Romania, people with disabilities are not respected yet as individuals with equal rights and are not fully recognized their value and dignity. At this time, people with disabilities face a number of handicaps created by society. Fundamental rights are violated, not by how they are formulated and stipulated in the legislation but by the inability to have real access to them. People with disabilities are a disadvantaged group, marginalized and discriminated quite often.

In Romania the integration of persons with disabilities in the labor market is a thorny issue where most employers are reluctant to hire such people. Making this study at the Social Inclusion Center in Craiova helped me to come to important conclusions about the inclusion of people with disabilities into the labour market. Major problems encountered in their inclusion are: prejudices of employers, social isolation and discrimination against people with disabilities.

In general, the employers who had never had a contact with a person with disabilities are skeptical about hiring them. Most of the times they have preconceived ideas that these people are not competent, have no skill and could not handle a job. The employers prefer to choose the simpler way and to pay a certain sum of money to the state instead of observing the appropriate percentage of employment of persons with disabilities. They evaluate the social composition somewhat superficial choosing to reject the option of hiring people with disabilities, for fear of not degrading the climate work and not disturbing the other employees. Thus, they lose sight of the fact that it could bring value to the organization if they give a chance to people who may be capable professionally speaking and that can show much dedication and loyalty.

I believe that in order to change the way of thinking of the employers, they should have a contact with persons with disabilities. This would be possible through a legislative amendment to require pupils / students to make compulsory practice at various companies during their studies. Thus, employers would be able to convince that people with disabilities can sometimes have more skills / qualities than normal people and they could keep the students that make progress during their apprenticeship in the company. Another way to change the attitudes towards the people with disabilities would be the campaigns of information and promotion and also the exposure of their success stories.

In most cases, the people with disabilities are labeled as unable to do something, useless, but they seem unusual when they succeed in getting noticed in different areas by going over many difficulties imposed by the society. Therefore, they become distrustful of their own skills and are not motivated to

take part in social activities. At the same time, many people with disabilities, who receive measures of social protection of various forms of remuneration from the State, prefer to choose to keep them than to find a job. Because of the rejection of the society, for many of them, it is extremely difficult to overcome personal barriers and to keep their optimism and perseverance to find a job, sometimes earning more aversion to others.

A chance would be to try to expose themselves more in the companies that promote vacancies and to appeal with confidence to the services provided by specialized NGOs to access the job easier. The NGO may help them to qualify professionally in various fields because entering in the labor market with low education, people with disabilities encounter difficulties in competing with those without disabilities. The current trend of the companies is to hire competitive individuals, with education and more experience that leads them to not take into account the option to recruit non-integrated individuals, even though many of them may have a great potential development level.

The deficiencies of these people limit their options to choose a job and the social prejudices may limit the number of employers that hire them. But with the help of NGOs that have as an object the insertion of disabled people in the labor market, they can be supported and can benefit from mediation in the labor market.

### **Recommendations**

1. The social model of disability must be taken and passed with perseverance by all stakeholders, particularly NGOs.

2. It requires training programs for effective advocacy, organization of a coherent and consistent approach to eliminate the barriers and to limit their effects by strengthening the associative environment and by broadening the collaborations and partnerships.

3. Development and diversification of programs such as parents' school and personal development to overcome the distrustful and uncertainty in their forces.

4. Monitoring the application of laws, identifying the violation of human rights, of concrete action in the complaint discrimination area and interventions of amendments / completion of the legislation in order to ensure social inclusion.

5. The organization of information / awareness campaigns of the public opinion- need to be approach specific issues of the labor market: the necessity and importance of education for a better life, equal opportunities, the benefits of employing disabled people, the importance of reinforcing the spirit of solidarity, the respect for diversity, the urgency of creating a friendly and accessible environment for all.

6. Supporting the employers in various forms must be shown in the legislative, operational and bureaucratic process carried on accessing the economic facilities that often discourages the employer. Thus, these benefits can be found only at a legislative level, in reality being felt more like disadvantages. Changing legislation and simplifying bureaucracy would make these benefits more tangible, leading to a better inclusion of the disabled people in the workplace.

7. The qualification of people at the workplace and the focusing on the practical side of the training programs can help increase confidence in their own knowledge until they will be accepted by the employer.

8. Employers might not be so reluctant to receive disabled people among their employees. A permissive and supportive context as well as the media coverage of the working experience with these people or success stories of people with disabilities would be able to convince the employers of their potential.