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Romanian welfare state: Lessons learned from 30 years of post-communist experience

Summary

The transition from planned to market economy meant reconsidering the welfare model and was one of the most important components of the changes affecting post-communist societies. The abolition of the state-planned economy implied, among others, abandoning the full employment policy and the emergence of new social risks that communist state had not faced in the past. In this context, the welfare model was readjusted according

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to market economy, to the political and cultural past of each post-communist society (Inglot 2003, 2008, 2009). This paper looks at the changes of welfare state in Romania, by analysing the changes in social expenditures over a period of 16 years (2000 to 2016). Using data retrieved from Eurostat the article compares Romania with the other EU member states, particularly with the post-communist ones. Using four indicators, the share of mean-tested benefits, the share of in-kind benefits, level of familism and total aggregate social expenditures, the paper employs a k-mean cluster analysis aiming to find out the place of the Romanian welfare state within EU. The results point out that Romania belongs to a familist minimalist welfare regime, together with most of the other post-communist countries. Countries in this group have low social spending and high involvement of the family in the welfare provision.

Key words: welfare state, social policy, Romania, cluster analysis

Introduction

The transition from planned to market economy meant reconsidering the welfare model and was one of the most important components of the changes affecting post-communist societies. The abolition of the state-planned economy implied, among others, abandoning the full employment policy and the emergence of new social risks that communist state had not faced in the past. In this context, the welfare model was readjusted according to market economy, to the political and cultural past of each post-communist society (Inglot 2003; 2008; 2009).

Despite several attempts to classify the welfare regimes that existed in post-communist states (see Deacon, 1993; 2000; Cerami, Vanhuysse, 2009), literature talks about the hybrid post-communist regime. This regime had solid roots in the welfare model from the communist period, which varied from one country to another, depending on the national specificities (Zamfir, Zamfir, 1995; Adăscăliței, 2012; Aidukaite, 2009). Several theoretical arguments support the idea that post-communist states evolved in the same direction, after the fall of communism. Hence, their welfare regimes are not too different, the similarities being rooted in the common inheritance of the communist period, and in the changes of economic and political nature during the transition period (E. Zamfir, 1993; 1997; C. Zamfir, 1997). However, according to the institutional perspective the differences in welfare regimes existing between post-communist states can be traced back to the pre-communist and communist time. The political choice made after the fall of the communist rule led to different paths for the welfare state of Central and Eastern Europe (Cerami, Vanhuysse, 2009; Inglot, 2008).

This article approaches the change of the welfare regime in Romania over the past thirty years by analysing its evolution in the wider context of post-communist states in Europe. We use the concept of welfare regime in the meaning outlined by Goodin et al. (1999), respectively of a “wide constellation of socio-economic institutions, policies, and programmes all directed towards promoting the welfare of the people" (p. 5), as the concept of welfare regime intersperses together social values with specific programmes and policies. As opposed to the concept of Welfare State, the concept of welfare regime covers a wider range of institutions and mechanisms involved in supplying welfare, as the idea of welfare mix is pivotal to the notion of welfare regime (Powell, Barrientos, 2004). Hence, in the current analysis realised in the present article focuses on institutional architecture of welfare provision and on the main actors involved in the process, namely the state, the market and the family, who are in charge with protecting the individuals against the new social risk.

The article is based on analysing administrative data provided by EUROSTAT, which allow for studying the welfare regime supply in Romania as compared with the other member-states of the European Union. The indicators used in the analysis allow for identifying the broad options of social policies, of the universal type policy versus means-testing policies, the level of social expenditures, or the family involvement in welfare supply. The article presents the dynamics from Romania over the period 2000–2017, as compared with the developments recorded in the other countries of the European Union. Restricting the analysis to this period is determined by the data availability that allow for comparative analyses, e.g. Romania versus other EU member-states. At the same time, by means of the cluster-type analysis, Romania will be placed in the wider context of European Union member states as regards the adopted welfare supply model.

The goal of the article is to capture the trajectory followed by the welfare regime in Romania over the past thirty years, by pursuing the Romanian occurrences in the context of the changes taking place in the welfare regimes of the other member states of the European Union. Because the available empirical data allow for a comparative analysis just for the European Union post-accession period, we focus mainly on that period.

The next section provides a brief presentation of the literature on welfare states, while the next one investigates the trends of several indicators of welfare provision in Romania during the past two decades, followed by a cluster analysis aiming to identify the clustering of the EU countries depending on their welfare profile. The article concludes with a discussion about the results and some conclusions based on them.

Literature review: welfare states and welfare mix

The analysis of the literature on welfare state takes into account the keynesist perspective, the post-Fordism one as well as the transition from welfare to workfare with reference to personal involvement in producing and maintaining the personal wellbeing. From the historical perspective of the welfare state, the origins of continental model were based on the Bismarckian governmental program and its Sickness Insurance Act from 1883 (Naumescu, 1999, p. 79–80; Schnapper, Bachelier, 2000, p. 202; C. Cace, 2004, p. 25) in the context of „individual liberalism model" (Mărginean, 1993, p. 439). The literature points out that Romania, as most of the countries in the region, follow the Bismarckian path and implemented conservative like policies from the beginning of the XX century. Back in time, one of the first use of the welfare state concept was recorded in the United States of America with the occasion of launching the social programs supporting single mothers with children (Handler, 2005, p. 174). Similarly, probably one of the first authors who used the term “welfare state” was Temple in 1941 in the famous book “The Citizen and Churchman” (Alcok et al, 2001, p. 49). Still, Beveridge report is the first official document using the concept of welfare state, in 1942 (Flora, Heidenheimer, 1995 in: Lazăr, 2010, p. 82).

In the past decades, due partially to the rises in interest for the changes of the model of welfare provision in Eastern Europe, the role of state in providing welfare for its citizens was on the spot of academic debate. If we consider the literature on the East European countries we can notice three approaches: studies focusing mainly on Western countries, comparative analysis between West-East and recently both West and East literature on the welfare states.

When referring to the literature focusing on welfare state typology, one notices that the current literature is strongly dominated by the first academic contributions from the first category (Pierson, 1991; Gould, 1993; Deacon, 1993; Leibried, 1993; Korpi, Palme 1998; Esping-Andersen, 1990; Korpi, 2000). Without any doubt, most of the analyses relays the one typology proposed by Gösta Esping-Andersen differentiating three welfare states: liberal, social democrat and conservative. In identifying the characteristics of the three welfare regimes, the role of the family, of the market and state were taken into consideration, the model dominated by solidarity and the degrees of de-commodification (Esping-Andersen, 1999, p. 85). Most of the critiques of this classification are directed to the lack of differentiation among existing welfare regimes. The author revised his theory based on the above-mentioned critiques by adding a new dimension to his model, namely insufficient potential of young mothers interested to go back to work explored from the perspective of the labour market. Moreover, he added three new case studies to his original analysis: the Australian case, the Mediterranean case, and the Japanese one (Esping-Andersen, 2003).

Thus, according to the above-mentioned classification, there are significant differences among capitalist countries with respect to welfare provision. Universalist model relays on high social spending and high redistribution of resources within society, the core principles of this welfare regime being social solidarity and equal chances for every citizen. The countries included in this group have a preference for service provision as opposed to cash transfers, while access to services and benefits is granted on the base of citizenship, every citizen being entitled to get support when needed. The most typical examples of universalist welfare states are the Scandinavian countries. Liberal welfare regimes are built around the principle of “meritocracy” and provide precedence to free market as main actor involved in the redistribution of resources within society, as opposed to the universalist regime where the state plays this role. The liberal welfare regime provides minimal welfare benefits, targeting mainly those “in need” and having a preference for cash transfers, access to benefits being granted based on testing the means of those applying for them. Typical examples of liberal countries are the United Kingdom and the United States. Conservative regime is built on the principle of subsidiarity and gives precedence to the family as the main actor in welfare provision. If the family fails on providing for its member, then the local community is in charge, the state intervening only in the last instance. Conservative regime is tailored on the male breadwinner—female homemaker model, the whole family getting access to benefits and services based on the insurance owned by the male breadwinner. Germany is the typical example in this case, Bismarckian model born here being later “exported” to other countries (Pierson, 1991; Gould, 1993; Deacon, 1993; Leibried, 1993; Esping-Andersen, 1990; Zamfir, 1997; Korpi, 2000; S. Cace, 2004; Stănescu, 2013; Ilie, Cace 2018).

In the beginning of the 1990s, the post-communist countries inherited a welfare regime in which the market was almost absent for the past half century. The communist welfare provision was built on the idea of shared property over the resources, promoting the principle of equality among all citizens. In reality, the state owned almost all resources and managed the economy and the social services, while access to social services and benefits had been granted based on employment status, the communist state promoting the full employment policy. The economic and political transformation in Central and Eastern Europe after 1990, brought unemployment which undermined the very principle of welfare provision during communism, and involved the free market in the welfare mix (Aidukaite, 2004; Cace, 2004b; Cerami, Vanhuysse, 2009; Stănescu, 2013).

When referring to the second proposed category of publications, one can notice the remarkable scientific contributions of researchers from post-communist countries in analysis regarding Bulgaria, Czech Republic, Estonia, Hungary Latvia and Lithuania, Poland, Romania and, Slovakia. volume edited by Cerami and Vanhuysse (2009) on the occasion of celebrating 20 years of post-communism in Europe makes an important contribution in this direction, shading light on the profile of the welfare regimes in these countries. Of particular interest for the current study is the overview on the welfare state in Bulgaria and Romania (Cerami, Stănescu, 2009). The analysis compares the institutional framework in the two countries, from the beginning of the XX century to the date, pointing out to the impact of path-dependency on the development of the welfare regime in the two countries. According to this study, Romania developed into a minimal welfare regime, being at the same time, influenced by the Bismarckian model.

With reference to Romania, despite the fact that a large literature was developed in the post-communist period on the above-mentioned subjects, this contribution was rather late integrated in the public policies framework. From this perspective, it is to be noticed that the first law on the national system of social assistance (Law 705/2001) was adopted more than one decade after 1989. This legislative effort was followed by other two versions: Law 47/2006 and Law 292/2011 which can be interpreted as a commitment to better regulate the field of interest.

Welfare mix in post-communist Romania

The analysis of the changes in the welfare regime in Romania, as compared with other countries of the European Union is based on a series of indicators that allow for outlining a profile by taking account of the generosity level of the welfare supply regime, and of the individual's and family involvement in supplying welfare. Moreover, allows for considering the preference for universal benefits, or of the ones addressing only certain groups in need, of the predominance of monetary transfers, or in-kind benefits. By pooling together all these indicators, a synthetic vision is obtained about the direction taken by the welfare supply regime in Romania after the year 2000.

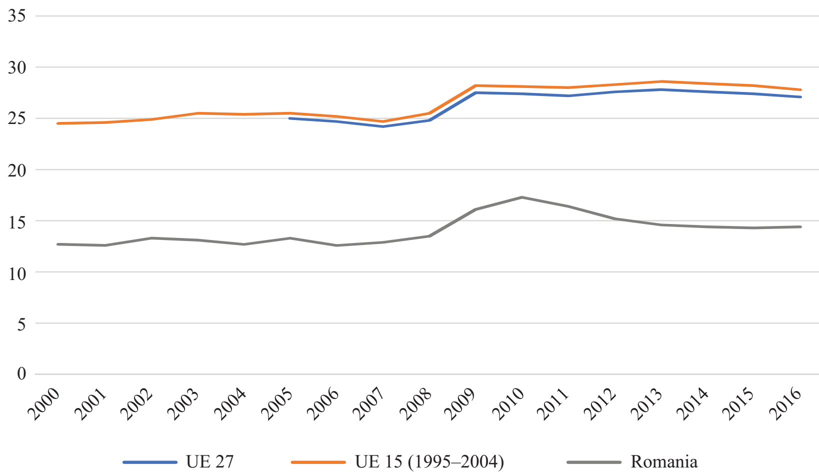

Figure 1. Percentage of social spending in GDP in Romania and EU 15 and EU 27 average (2000–2016)

Source: Eurostat [spr_exp_fto]

Irrespective of the indicator considered, or of the year of reference, comparing Romania with the other countries of the European Union ranks the country on the last position regarding the social expenditures as share in GDP, indicated a marked preference for restricting expenditure on social protection, education, or health all over the period after 2000. The data from Figure 1 indicate the gap between Romania and the EU average as regards the share in GDP of social expenditures. Moreover, if we analyse the dynamics of the social expenditures in Romania, as compared with the EU average, a deepening of the gap is found between the two, especially after 2012. In the period of 2000–2008, the weight of social protection expenditures is maintained relatively constant in both Romania and the EU, and the outbreak of the economic crisis in 2008 marks the increase of social expenditures both in Romania and the EU because of the increased need for social support granted to vulnerable groups. Nonetheless, the difference emerges by the end of the crisis, when in Romania the share of social protection expenditures decreases yet again, while the EU average remains at a level close to the one preceding the crisis period. This evolution shows the reactive character of the social policies implemented by Romania, ones that react only when needed and returns to the same level of minimal supply of social benefits and services once the acute need is over. The share in GDP of public expenditures with education and health (see Table 4 in the Annex) indicate very low financing of these sectors and bring additional arguments that support the preference for state retrenchment from welfare provision. It should be mentioned that most post-communist states diminished their public financing for social programmes and public policies over the transition period, but Romania had over the last two decades the lowest level of public expenditures of this kind within the entire EU.

Beyond the size of social expenditures, the type of transfers and the preference for universal-type benefits, or aimed just for certain groups in need, are both important indicators in describing the welfare supply regime. According to the literature universal regimes, prefer universal benefits and services' supply, whereas liberal regimes aim benefits and services to certain disadvantaged groups and prefer monetary transfers (E. Zamfir, 1997). Regarded from the perspective of this latter indicator, the welfare regime from Romania is close to the minimalist liberal regimes, as the supply of services is lower as compared with monetary transfers (see Table 5 in the Annex). Nevertheless, the universal-benefits have higher share as compared with the means-testing ones, which are below 1% as weight in GDP. It might be asserted that Romania provides minimal support with very low social expenditure, as the money is rather allotted to monetary transfer to larger categories of population. These options are reflected in the preference for low budgetary expenditures intended to redistribute the resources within the society and to supporting disadvantaged groups. Moreover, if we consider the data from a European comparative perspective, Romania is placed constantly among the countries with very low weights of budgetary expenditures aimed to any kind of social protection. According to the data in the Tables 5–7 from the Annex, only the Baltic countries and partially Bulgaria, Slovakia and Hungary are circumscribed to a similar trend.

State retrenchment from the welfare provision required the intervention of other actors for taking over the areas that remained exposed. One can mention here the market and the individual and family. We selected as indicator of the individual effort for ensuring welfare the weight of private expenditures for health services. Though the indicator measures the expenditures of households for health care, they provide for a measure of the individual involvement in the welfare mix, covering what remains left aside by the state, or by the public insurance in the medical field. The data from Table 8 (see Annex) show that in the countries with a universal welfare regime, such as the northern countries and the Netherlands, the level of these expenditures varies between 10% and 15%. At the opposite pole, are placed Bulgaria, Cyprus, and Latvia, states where more than 40% from the health expenditures are covered by the personal budgets. Romania is ranked in the lower half of the list, with a private contribution to healthcare by 24% ion 2011, which decreases to 20% as of 2013. It should be mentioned that, in the case of Romania, it is not about the state budget, or the public insurances taking over the health expenditures, as in the case of the states with universal welfare regimes, but about the underfinancing of health services, and the low access of the population to these services. Actually, the state's retrenchment from the health sector and the privatisation of the primary health care services, in parallel with the development of a system based on insurances left large part of the burden with these expenditures on the shoulders of the individuals and families. Thus, they allocate limited resources for health care because of the financial restrictions resulting from the "low wage policy" (Zamfir, 2020).

In order to evaluate the degree of involvement of the family in the welfare mix, the article uses as indicator the share of children below 3 years of age who do not attend the crèche/kindergarten, and are exclusively in the care of the family (Spannagel, 2013). The data presented in Table 9 from the Annex allow for pursuing the evolution of the indicator over the period of 2012–2016, among the member-states of the EU. Romania is counted among the countries with the highest level of family involvement in the social services and benefits mix, together with other post-communist states like Bulgaria, Poland, Czech Republic, Slovakia, Croatia, or the Baltic states. The lowest level of family involvement may be noticed in the northern countries, where the share of children below 3 years of age in the exclusive family care in 2016 varies between 30% in Denmark and 49% in Sweden. It should be noticed that Finland has a much higher family involvement level than the other Northern countries.

Based on reviewing the data regarding the welfare mix, for Romania the image of a minimal state may be outlined, with very low public expenditures, that attempts to minimise the involvement of the state in redistributing resources within society and in ensuring a safety net for the members of the society. Just as noticeable, is the resistance to changing this mix, as the level of expenditures increases during times of crisis, and returns to a level similar to the one preceding the crisis, a fact that does not occur, in general, in the EU member-states. As regards the actors taking over the functions of the state in this mix, Romania is in the top of the countries where the family plays and essential role as support net and social services supplier.

Welfare supply mix in EU member-states

One of the research questions that this article intends to answer refers to the existence of a similar pattern in structuring the welfare mix in the post-communist countries. Starting from the idea that on the fall of the communist regime, the transition countries had a similar structure in the welfare mix, the article makes an enquiry into the current pattern existing in the EU member-states attempting to identify the manner in which the post-communist states evolved over the last three decades. The choice of indicators relays on the literature review of welfare regimes (see the previous section) and tries to distinguish between universal, liberal and conservative regime. In order to achieve this objective, the study makes use of four indicators regarding the way of managing welfare supply, and using the k-mean cluster analysis identifies three groups of countries coinciding largely with the classifications previously realised in the literature. The analysis is based on 2015 data that provided complete information for all EU member-states regarding the four variables of interest.

The four variables used in the analysis are:

— The share of universal benefits expenditures in the GDP (source EUROSTAT [spr_exp_fto]);
— The share of in-kind expenditures in the GDP (source EUROSTAT [spr_exp_fto]);
— The share of children below 3 years of age in the care of family (degree of familism) (source EUROSTAT [ilc_caindformal]),
— The share of total expenditure on social protection in the GDP (source EUROSTAT [spr_exp_fto]).

The first two variables indicate the option for a universal regime centred on redistributing to all members of the society and on supplying social services as alternative to monetary transfers, both being characteristics of the universal-type regimes. The third variable indicates the degree of involvement of the family in supplying welfare, and the fourth shows the preference for state supplied social protection. Practically, while the last variable informs about how much is spent with social protection by the state, the first two show how expenditures are made, and the third whether the family is the actor taking over the functions of the state.

Table 1. Cluster membership

Universalist	Continental minimalist	Familist minimalist
Belgium	Germany	Bulgaria
Denmark	Estonia	Czechia
France	Ireland	Greece
Luxembourg	Spain	Croatia
The Netherlands	Italy	Lithuania
Portugal	Cyprus	Hungary
Sweden	Latvia	Austria
Norway	Malta	Poland
	Slovenia	Romania
	Finland	Slovakia
	United Kingdom	

Source: author's classification based on the available EUROSTAT data.

The outcomes of the k-mean cluster analysis indicate the grouping of the EU member-states and associated countries into three categories as detailed above. Most of the existing comparative work on welfare typology is based on countries case studies or looks mainly at the OECD countries for which there is more data on welfare spending available (Kuitto, 2011). Thus, most of the comparative work provide a deep understanding of the welfare arrangements existing in a limited group of countries and when the expenditure is considered the indicator usefully employed is the aggregate social expenditure (ibid.). Thus, Kuitto (2011) analyses the welfare mix based on the welfare spending, distinguishing between the share of cash and in-kind benefits, arriving at a typology with five classes. However, this analysis does not include a measure of familism, which is an important factor in the welfare mix. Our results partially overlap with the one reported by the author, however, using different variables in building the clusters leads to different number of clusters and different cluster composition.

The first group is the one of the countries classified usually in the category of the universalist regimes. It includes, according to the presentation in Table 1, the Scandinavian countries, with the exception of Finland, as well as the Netherlands, France, Belgium, Luxembourg, and Portugal. The countries in this group have high social protection expenditure, preferring universal benefits and social services, while the family has a low involvement level in the welfare mix (see Table 3). The presence of France, Belgium, and Luxembourg in this group is owed to the inclusion of a certain measure of familism among the classification criteria, as it is known that these countries have a high involvement level of the state in the supply of social services (Lohkamp-Himmighofen, Dienel, 2000).

Table 2. Cluster centers

	Universalist	Continental minimalist	Familist minimalist
No-mean tested benefits	24.78	19.78	18.71
In-kind benefits	10.19	7.30	5.87
Familism	47.55	68.15	88.13
Total social expenditure	20.06	13.55	13.75
Number of countries	8	11	10

Source: own computation based on EUROSTAT data.

The second group was names minimalist continental, as it reunites the states belonging to the category of continental regimes, to which are added states with preponderantly liberal orientation such as Great Britain, and Ireland, and three post-communist countries, Estonia, Latvia, and Slovenia, respectively. Here, one should mention that the results reported by Kuitto (2011) also include Great Britain into the continental cluster. According to the data in Table 2, the countries in this group are characterised by very low social protection expenditures, with moderate family involvement the welfare mix and moderate preference for universal benefits and social services.

Table 3. Cluster analysis ANOVA Test

	Cluster average	Av. error[2]	F	p
no-mean tested benefits	90.7	21.8	4.147	.027
in kind benefits	42.2	5.7	7.449	.003
familism	3.7	37.0	98.986	.000
total social spending	119	33.0	3.615	.041

Source: own computation based on EUROSTAT data.

The third groups was named minimalist, based on family, including most of the post-communist countries to which are added Greece, and Austria. This group of countries is characterised by low expenditures for social protection, low orientation on universal benefits and social services. In turn, family is the one playing an important role in providing welfare, by taking over the functions of the state that retrenched its functions along with the economic restructuring during the transition period. Romania is included in this group and, as shown previously, it fits this profile well by promoting a minimalist-type welfare supply regime where the state surrendered the functions to the family as main supplier of welfare.

Conclusions

This article approaches the evolution of the welfare regime in Romania over the post-communist period. By having as starting point the communist regime, which promoted welfare based on labour, nonetheless monitored strictly by the state, Romania has been going down the road towards a new welfare regime for the last 30 years. The article answers some of the research questions about how the welfare mix evolved in Romania over the past three decades. Which were the effects of the state retrenchment from its social functions that were fulfilled during the communist period, and who took over these functions? Where is Romania positioned against the other post-communist countries? To find answers to these questions, we have used administrative data regarding the profile of budget expenditures, and we described the trends observed according to these data. Additionally, we realised a cluster-type analysis for identifying how Romania positions itself in the context of the European Union as regards the mix of welfare supply. The available data have limited the trends' analysis to the period of 2000–2016, and to identifying a grouping for EU member-states in the year 2015.

Based on the data presented in this article, it may be asserted that for the last two decades Romania restricted a lot its budgetary expenditures for social protection, education and health, by practicing a social policy prioritising monetary transfers. The reasoning in this respect was related to maintaining administrative expenditures at the lowest level possible, and retrenching very much the involvement of the state in welfare. The retrenchment of the state left an empty place as regards the supply of social services, and ensuring a social safety net. The highest part of these attributions were taken over by the family under the conditions in which the market economy was developed insufficiently for ensuring the transition to a liberal welfare regime, and the non-governmental sector was almost inexistent by the beginning of the transition.

Moreover, the outcomes of the cluster analysis show that Romania is not a separated case, as most of the post-communist countries have similar profiles. In the same category, as well, is included Greece, a state that was faced during the last couple of years with several economic and political crises solved by the intervention of the international economic institutions, such as the International Monetary Fund, and the World Bank. The international institutions' involvement might be the common denominator for explaining the existence of a similar mix in most post-communist states, and Greece. Future studies should analyse to what extent this hypothesis is validated and which was the ingredient that led to the emergence of this welfare regime.

An important role in understanding the mechanisms that led to outlining a minimalist family-type welfare regime might have also been played by the comparison of the states that represent currently this group of countries with three post-communist states belonging to the continental minimalist group. Therefore, future studies should focus on the differences existing between Estonia, Latvia, Slovenia, and the rest of the post-communist countries within the European Union. Last, but not least, the effects of this change should be analysed and understood as regards the welfare regime change, respectively effects at social, economic, and political level. However, this is an investigation topic for future studies.

Last but not least, an increased visibility of the scientific analysis conducted by East European researchers would support a better academic debate and would impact on the improvement of welfare provision with a direct impact on assuming the national commitments towards accomplishment of European and national social policy related goals. Additionally, this would support an increase in welfare provision related programs. This article contributed towards this direction.

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Appendix

Table 4. Percentage of public spending with education in GDP in EU member state between 2012 and 2016

	2012	2013	2014	2015	2016
Belgium	23.8	24.4	22.4	21.3	21.1
Bulgaria	92.5	88.5	88.9	90.9	91.4
Czech Republic	34.5	31.1	28.9	30.2	27.9
Denmark					
Germany	11.8	11.8	11.3	11.9	12.0
Estonia	66.7	92.0			
Ireland	99.3		99.0	95.8	
Greece	99.8	99.9	99.9	99.8	
Spain	15.2	15.1	15.0	14.6	14.2
France	72.4	72.2	72.4	72.8	73.2
Croatia					
Italy	82.1	81.8	81.4	81.4	85.9
Cyprus	100.0	100.0	100.0	100.0	100.0
Latvia	64.2	63.7	65.6	69.0	63.9
Lithuania	80.2		80.2	77.8	73.3
Luxembourg	88.1		85.8	84.7	
Hungary	67.5	88.3		87.0	87.8
Malta	100.0	100.0	100.0	100.0	
Netherlands	93.3	93.6	93.7	94.5	95.3
Austria	77.0	75.4	75.3	75.6	75.2
Poland	26.3	29.2	28.8	30.1	75.7
Portugal		86.5	87.8	83.6	
Romania	34.0	32.0	27.8	27.3	30.3
Slovenia	82.0	81.1	79.3	82.0	82.9
Slovakia	78.3	78.7	78.6	80.4	
Finland	54.7	54.1	53.8	51.9	51.7
Sweden		99.3	99.3		
United Kingdom	48.7	53.8	54.9	56.3	67.1

Source: EUROSTAT [educ_uoe_finf01]; data for Denmark and Croatia were missing. Other empty cells are missing data.

Table 5. Percentage of cash benefits in GDP in EU member states between 2000 and 2016

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Belgium	17.2	17.6	18.1	18.5	18.2	18.1	17.9	17.4	18.1	19.7	19.3	19.6	19.3	19.7	19.7	19.7	19.0
Bulgaria						10.0	9.8	9.1	9.5	11.4	11.9	11.1	11.1	11.9	12.2	12.0	11.7
Czech Republic	11.7	11.5	11.9	11.9	11.2	11.5	11.4	11.7	11.9	13.4	13.3	13.3	13.5	13.3	12.8	12.3	12.2
Denmark	16.9	17.0	17.0	18.0	17.8	17.4	16.4	16.4	16.0	18.2	18.2	18.2	18.1	18.8	19.1	18.6	17.6
Germany	19.0	18.9	19.4	19.6	19.3	18.8	17.8	17.1	17.2	18.8	18.2	17.4	17.4	17.4	17.2	17.3	17.3
Estonia	9.3	8.8	8.6	8.6	9.0	8.6	8.3	8.2	10.1	13.4	12.4	10.9	10.4	10.3	10.2	11.2	11.3
Ireland	8.7	8.9	9.1	9.1	9.6	9.6	9.7	10.1	11.9	14.9	15.3	14.7	14.5	13.9	12.6	9.5	9.5
Greece	13.0	13.3	13.2	13.0	13.4	14.2	14.6	15.1	16.1	17.7	18.6	20.6	21.4	20.3	20.8	20.8	20.6
Spain	12.8	12.5	12.6	12.6	12.7	12.7	12.5	12.8	13.5	15.7	15.9	16.6	17.0	17.6	17.3	16.5	16.2
France	17.6	17.7	18.0	18.3	18.3	18.3	18.1	17.9	18.1	19.6	19.6	19.6	20.0	20.3	20.4	20.2	20.3
Croatia									12.6	13.9	14.0	13.9	14.0	14.2	14.1	14.0	13.5
Italy	17.3	17.1	17.4	17.8	17.7	17.7	17.9	18.0	18.6	20.2	20.3	20.3	21.0	21.6	21.7	21.9	21.5
Cyprus	10.8	10.8	11.6	12.8	12.9	12.9	12.8	12.4	13.0	14.3	14.0	14.9	15.9	16.8	16.1	15.7	15.0
Latvia	11.7	10.7	10.1	9.3	8.7	8.1	7.7	6.8	8.1	12.5	13.6	11.0	10.3	10.5	10.3	10.6	10.8
Lithuania	9.9	9.1	8.7	8.4	8.5	8.3	8.3	9.3	10.6	14.6	12.7	11.0	10.6	9.9	9.8	9.9	9.7
Luxembourg	12.6	13.7	14.4	15.4	15.2	15.0	14.0	13.3	14.3	16.2	15.4	15.0	15.6	15.7	15.3	15.3	15.0
Hungary	12.4	12.2	12.8	13.0	12.8	13.3	13.7	14.2	14.8	15.2	14.8	14.5	14.8	14.3	13.3	12.8	12.5
Malta	11.8	12.3	12.3	12.1	12.1	12.1	12.1	12.0	12.2	12.8	12.9	12.5	12.8	12.4	11.7	10.5	10.3
Netherlands	16.3	15.9	16.3	16.9	16.7	16.4	15.9	15.5	15.5	17.0	17.4	17.8	18.2	18.6	18.5	18.1	18.0
Austria	19.6	19.5	19.7	20.1	19.7	19.3	19.0	18.4	18.7	20.1	20.2	19.5	19.7	20.1	20.1	20.1	19.8
Poland	15.8	16.9	17.0	16.9	16.1	15.7	15.4	14.1	14.2	15.1	14.6	13.8	14.0	14.4	14.2	14.2	15.2
Portugal	12.1	12.5	13.0	13.9	14.5	14.9	15.1	14.9	15.3	16.8	17.0	17.5	18.0	19.2	18.7	18.1	17.3
Romania	8.4	8.2	8.8	8.4	8.6	8.9	8.6	8.8	9.6	11.7	12.4	11.6	10.8	10.3	10.1	10.1	10.1
Slovenia	15.8	15.8	15.9	15.3	15.1	14.9	14.7	13.8	13.6	15.5	16.1	16.3	16.3	16.6	16.0	15.6	15.2
Slovakia	12.1	11.7	11.7	11.3	10.7	10.3	10.1	9.9	9.6	11.8	11.8	11.6	11.7	11.8	11.8	11.6	11.5
Finland	15.6	15.4	15.7	16.0	15.9	15.7	15.4	14.8	14.8	17.4	17.7	17.2	17.9	18.7	19.3	19.3	19.2
Sweden	16.3	16.2	16.6	17.2	16.9	16.7	15.9	14.9	15.0	16.5	15.5	15.2	15.8	16.3	15.7	15.4	15.3
United Kingdom	15.2	15.2	14.2	14.8	14.7	15.3	15.2	14.6	15.5	17.3	17.6	17.5	17.6	17.1	16.7	16.5	15.6

Source: EUROSTAT [spr_exp_fto]. Empty cells are missing data.

Table 6. Percentage of in-kind benefits in GDP in EU member states between 2000 and 2016

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Belgium	6.6	6.7	7.0	7.3	7.5	7.5	7.4	7.5	8.0	8.8	8.6	8.7	8.9	9.2	9.2	9.3	9.1
Bulgaria						4.2	3.7	3.9	4.7	4.2	4.6	4.9	5.0	5.2	5.7	5.3	5.3
Czech Republic	5.7	5.7	6.1	6.1	6.0	5.9	5.6	5.3	5.4	6.1	6.1	6.2	6.3	6.3	6.3	6.1	6.2
Denmark	10.5	10.6	11.1	11.3	11.3	11.2	11.2	11.6	12.0	13.4	13.2	12.8	12.7	12.5	12.4	12.4	12.2
Germany	8.7	8.7	8.9	9.1	8.7	9.0	8.9	8.7	8.9	10.5	10.3	10.1	10.1	10.4	10.5	10.7	10.9
Estonia	4.3	4.0	3.8	3.8	3.8	3.7	3.5	3.7	4.5	5.2	5.0	4.6	4.5	4.3	4.5	4.7	5.1
Ireland	5.3	5.8	6.2	6.4	6.5	6.5	6.5	6.7	7.5	8.3	8.6	8.5	8.2	7.8	7.2	5.6	5.7
Greece	4.5	4.7	4.8	5.0	5.0	5.7	5.6	5.8	6.3	6.6	6.8	6.2	6.1	5.4	4.7	5.0	5.3
Spain	6.3	6.2	6.4	6.7	6.7	6.9	7.0	7.0	7.5	8.2	8.3	8.3	7.9	7.7	7.6	7.7	7.1
France	9.6	9.7	10.1	10.5	10.6	10.6	10.6	10.5	10.6	11.4	11.3	11.3	11.5	11.6	11.7	11.7	11.8
Croatia									5.7	6.6	6.7	6.7	7.2	6.7	7.3	7.4	7.4
Italy	5.7	6.0	6.1	6.1	6.4	6.7	6.8	6.5	6.9	7.3	7.3	7.1	7.0	7.1	7.1	6.9	6.9
Cyprus	2.7	2.8	3.0	3.5	3.2	3.3	3.6	3.7	3.8	4.5	4.4	4.4	3.9	3.9	3.5	3.7	3.7
Latvia	3.2	3.5	3.2	3.4	3.3	3.7	3.9	3.5	3.8	4.1	4.4	4.0	3.8	3.9	4.0	4.1	4.1
Lithuania	5.3	5.1	4.9	4.6	4.5	4.4	4.6	4.5	4.9	5.8	5.5	5.2	4.9	4.6	4.6	4.8	4.9
Luxembourg	5.4	5.7	5.9	6.0	6.4	6.5	6.1	5.8	6.2	6.8	6.7	6.4	6.8	7.1	6.8	6.6	6.5
Hungary	6.8	6.5	6.8	7.4	7.1	7.7	7.7	7.4	7.1	7.1	7.2	6.9	6.3	6.2	6.3	6.2	6.3
Malta	4.5	4.7	4.9	5.0	5.5	5.4	5.5	5.6	5.8	6.6	6.2	6.2	6.1	6.3	6.3	6.1	6.1
Netherlands	6.4	6.5	7.1	7.4	7.4	7.4	8.7	8.7	8.9	9.9	10.0	10.0	10.3	10.2	10.1	10.1	10.1
Austria	7.5	7.6	7.7	7.7	7.8	7.8	7.8	7.8	8.1	8.6	8.7	8.5	8.6	8.7	8.9	9.0	9.2
Poland	3.3	3.6	3.7	3.8	3.7	3.7	3.8	3.8	4.6	4.8	4.6	4.4	4.4	4.7	4.7	4.7	4.7
Portugal	6.3	6.5	7.6	7.3	7.3	7.3	7.2	6.8	6.9	7.7	7.4	6.7	6.9	6.9	6.8	6.6	6.6
Romania	4.3	4.4	4.5	4.7	4.1	4.4	4.0	4.2	3.9	4.4	4.9	4.8	4.5	4.3	4.3	4.1	4.3
Slovenia	7.3	7.5	7.4	7.4	7.3	7.2	7.1	6.6	6.9	7.7	7.8	7.8	8.1	7.7	7.5	7.8	7.7
Slovakia	6.4	6.4	6.5	6.2	5.5	5.2	5.2	5.2	5.6	6.1	5.9	5.7	5.8	6.0	6.1	6.1	6.3
Finland	8.0	8.0	8.4	8.7	8.9	9.1	9.1	9.0	9.6	10.8	10.8	10.9	11.4	11.6	11.8	12.1	12.1
Sweden	11.5	11.8	12.3	12.6	12.3	12.2	12.1	11.9	12.3	13.2	12.7	12.8	13.1	13.4	13.5	13.5	13.8
United Kingdom	7.4	8.0	8.2	8.6	9.0	9.1	9.2	9.1	9.3	10.4	10.5	11.0	11.0	10.9	10.6	10.9	10.4

Source: EUROSTAT [spr_exp_fto]. Empty cells are missing data.

Table 7. Percentage of non-means tested benefits in GDP in EU member states between 2000 and 2016

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Belgium	22.8	23.3	23.9	24.6	24.5	24.4	24.1	23.7	24.8	27.1	26.5	26.9	26.8	27.3	27.5	27.6	26.6
Bulgaria						13.3	12.6	12.3	13.6	14.9	15.8	15.3	15.4	16.3	17.2	16.7	16.4
Czech Republic	16.0	16.0	16.7	16.7	16.0	16.5	16.2	16.5	17.0	19.2	19.0	19.1	19.4	19.1	18.5	17.9	17.9
Denmark	26.6	26.8	27.2	28.4	28.2	27.8	26.8	18.6	18.5	21.3	20.7	20.1	19.8	20.1	20.3	19.7	18.7
Germany	24.9	24.9	25.5	25.7	24.9	24.4	23.3	22.6	23.0	25.8	25.1	24.2	24.3	24.5	24.4	24.5	24.5
Estonia	13.3	12.4	12.2	12.1	12.6	12.2	11.7	11.8	14.4	18.5	17.3	15.3	14.7	14.6	14.6	15.8	16.3
Ireland	10.6	11.3	11.6	11.8	12.3	12.3	12.3	12.7	14.5	17.0	16.9	16.0	15.6	14.7	13.6	10.5	10.8
Greece	17.1	17.5	17.5	17.6	17.7	19.2	19.5	20.0	21.6	23.5	24.5	25.9	26.7	24.6	24.0	24.3	24.6
Spain	16.6	16.4	16.6	16.9	17.0	17.0	16.9	17.1	18.2	20.6	20.6	20.8	21.3	21.7	21.4	20.9	20.3
France	24.0	24.1	24.9	25.6	25.7	25.7	25.4	25.2	25.5	27.5	27.6	27.5	28.0	28.4	28.6	28.5	28.6
Croatia									17.3	19.4	19.7	19.5	20.1	19.9	20.3	20.4	19.9
Italy	21.6	21.7	22.1	22.5	22.7	23.0	23.2	23.1	24.0	25.7	26.0	25.8	26.5	27.0	26.7	26.6	26.1
Cyprus	12.7	12.7	13.4	14.8	14.6	14.9	14.9	14.5	14.8	16.3	15.8	16.6	16.9	18.0	16.9	16.6	15.9
Latvia	14.7	13.9	13.1	12.4	11.8	11.6	11.4	10.2	11.7	16.3	17.3	14.4	13.8	14.1	14.1	14.6	14.8
Lithuania	14.5	13.6	12.9	12.4	12.5	12.5	12.7	13.6	15.2	19.9	17.2	15.2	14.5	13.7	13.9	14.3	14.2
Luxembourg	17.0	18.8	19.6	20.8	20.9	20.8	19.5	18.5	20.0	22.1	21.3	20.6	21.5	21.9	21.3	21.1	20.7
Hungary	17.9	17.5	18.5	19.4	19.0	19.8	20.5	20.3	20.7	21.1	20.9	20.4	20.2	19.7	18.9	18.3	18.1
Malta	13.0	13.9	14.1	14.0	14.4	14.5	14.6	14.6	15.5	16.8	16.6	16.2	16.5	16.3	15.6	14.5	14.5
Netherlands	20.4	20.3	21.2	22.2	21.9	21.5	22.0	21.3	21.3	23.4	23.8	24.2	24.8	25.0	24.9	24.1	23.9
Austria	25.2	25.3	25.5	25.9	25.4	25.0	24.7	24.2	24.6	26.4	26.5	25.7	26.0	26.4	26.5	26.4	26.3
Poland	18.1	19.5	19.9	19.7	18.8	18.2	18.1	17.0	18.1	19.1	18.5	17.6	17.7	18.4	18.2	18.3	19.0
Portugal	17.1	17.5	18.7	19.3	19.4	19.8	20.2	19.8	20.1	22.0	21.9	22.1	22.7	23.9	23.4	22.7	22.0
Romania	11.6	11.9	12.4	12.3	11.7	12.4	11.8	12.1	12.8	15.1	16.1	15.6	14.6	14.0	13.8	13.6	13.8
Slovenia	20.9	21.2	21.2	20.5	20.2	20.0	19.8	18.6	18.7	21.3	21.9	22.1	22.5	22.5	21.6	21.5	21.1
Slovakia	16.2	15.8	16.3	16.2	15.4	14.7	14.4	14.1	14.4	17.0	16.7	16.4	16.6	16.9	17.1	16.9	17.1
Finland	22.1	22.0	22.7	23.3	23.5	23.5	23.4	22.7	23.3	27.0	27.3	26.8	27.9	28.7	29.4	29.5	29.3
Sweden	26.5	26.8	27.7	28.9	28.3	28.0	27.2	26.1	26.6	28.9	27.4	27.2	28.1	28.9	28.4	28.1	28.4
United Kingdom	19.3	19.8	19.0	19.8	20.0	20.8	20.8	18.9	19.6	21.8	22.1	22.6	22.8	22.6	22.2	22.6	21.4

Sursa: EUROSTAT [spr_exp_fto]. Empty cells are missing data.

Table 8. Out-of-pocket expenditure on healthcare: Percentual share of total current health expenditure in EU member states between 2011 and 2017

	2011	2012	2013	2014	2015	2016	2017
Belgium	17.65	17.31	17.47	17.15	16.46	15.86	
Bulgaria	44.46	47.74	47.1	45.81	47.67	47.96	46.55
Czech Republic			13.59	14.08	14.83	15.02	14.81
Denmark	14.55	14.16	13.81	13.77	13.67	13.71	13.74
Germany	13.92	13.98	13.12	12.70	12.83	12.73	12.50
Estonia	21.56	21.52	22.61	22.62	22.77	22.69	23.60
Ireland	13.91	13.89	14.28	14.03	13.25	12.78	12.28
Greece	30.92	30.14	33.69	36.63	36.43	34.60	34.75
Spain	21.11	22.84	23.98	24.36	23.79	23.94	23.57
France	10.21	10.13	9.97	9.88	9.76	9.76	
Croatia			12.83	15.75	15.51	15.36	
Italy		21.68	21.76	22.14	23.14	22.93	23.49
Cyprus	42.80	44.04	43.09	44.75	44.34	45.25	44.64
Latvia			38.47	39.11	42.07	44.56	
Lithuania	28.22	31.80	32.82	31.49	31.84	32.32	32.28
Luxembourg	10.88	10.44	11.05	11.02	10.58	10.46	10.67
Hungary	28.22	29.37	28.36	28.34	27.47	27.70	26.87
Malta				36.76	37.47		
Netherlands	9.48	10.09	11.53	11.59	11.29	11.30	11.09
Austria	18.74	18.67	19.17	19.10	19.09	19.30	19.20
Poland			23.65	23.13	23.25	22.94	
Portugal	26.30	28.18	26.97	27.70	27.73	27.79	27.53
Romania	24.28	22.43	20.18	20.31	21.28	20.75	20.49
Slovenia				12.98	12.50	12.00	
Slovakia		23.23	23.32	18.01	18.44	18.19	18.71
Finland	19.34	18.70	18.93	18.92	19.78	20.50	20.23
Sweden	15.04	15.40	15.54	15.51	15.49	15.34	15.03
United Kingdom			15.04	14.97	15.12	15.49	15.96

Source: EUROSTAT [TEPSR_SP310]. Empty cells are missing data.

Table 9. Share of children under 3 years old not in public daycare between 2012 and 2016

	2012	2013	2014	2015	2016
Belgium	53	54	51	50	56
Bulgaria	92	89	89	91	88
Czech Republic	97	98	96	97	95
Denmark	33	35	30	23	30
Germany	76	73	73	74	67
Estonia	82	80	81	79	70
Ireland	69	72	73	69	71
Greece	80	86	87	89	91
Spain	64	64	63	60	61
France	60	61	61	58	51
Croatia	89	89	83	88	84
Italy	80	79	77	73	66
Cyprus	74	76	75	79	75
Latvia	76	77	78	77	72
Lithuania	92	90	77	90	85
Luxembourg	52	54	51	48	49
Hungary	92	90	86	85	84
Malta	83	79	82	82	69
Netherlands	54	54	55	54	47
Austria	87	83	84	78	80
Poland	94	95	94	95	92
Portugal	66	63	55	53	50
Romania	85	94	97	91	83
Slovenia	62	61	63	63	61
Slovakia	95	97	94	99	100
Finland	71	71	67	67	67
Sweden	47	45	43	36	49
United Kingdom	73	70	71	70	72

Source: EUROSTAT [ilc_caindformal].

Streszczenie

Artykuł analizuje przemiany państwa opiekuńczego w Rumunii, skupiając się na zmianach wydatków socjalnych w okresie 16 lat (2000–2016). Opierając się na danych Eurostatu, w artykule porównujemy Rumunię z innymi państwami członkowskimi UE, szczególnie z krajami postkomunistycznymi. Dokonujemy analizy skupień z wykorzystaniem czterech wskaźników: udział świadczeń przyznawanych na podstawie kryterium dochodowego, udział świadczeń rzeczowych, poziom familializmu i wysokość łącznych wydatków socjalnych kraju. Ma to na celu ustalenie miejsca rumuńskiego państwa opiekuńczego w UE. Wyniki wskazują, że podobnie jak większość innych krajów postkomunistycznych, Rumunia należy do rodzinnego minimalistycznego (*familist minimalist*) reżimu polityki społecznej. Kraje z tej grupy charakteryzują się niskim poziomem wydatków socjalnych i wysokim zaangażowaniem rodzin w zapewnienie dobrobytu mieszkańcom.

Słowa kluczowe: państwo opiekuńcze, polityka społeczna, Rumunia, analiza skupień