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TRADITIO ET EXCELLENTIA

SOCIOLOGIA

1/2024

STUDIA
UNIVERSITATIS BABEŞ-BOLYAI
SOCIOLOGIA

Volume 69, Issue 1, June 2024

ISSN (print): 1224-8703; ISSN (online): 2066-0464; ISSN-L: 1224-8703

STUDIA UNIVERSITATIS BABEŞ-BOLYAI

https://studia.reviste.ubbcluj.ro/index.php/subbsociologia
studiasociology@gmail.com
Studia UBB Sociologia on Sciendo's platform:
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Studia UBB Sociologia is the peer-reviewed journal of the **Faculty of Sociology and Social Work**, published bi-annually (June and December) as part of the *Studia UBB* Series of the **"Babeş-Bolyai" University**.

The journal is oriented towards research articles, discussion papers, essays and book reviews which address challenging topics from the fields of Sociology, Anthropology, Social Work and Social Policy.

Academic papers grounded in empirical research or focused on the social realities of Central and Eastern Europe are particularly welcomed.

YEAR Volume 69 (LXIX) 2024
MONTH JUNE
ISSUE 1

S T U D I A
UNIVERSITATIS BABEŞ–BOLYAI
SOCIOLOGIA

1

CONTENTS

STUDIA UBB SOCIOLOGIA, 69 (LXIX), 1, 2024, pp. 5-38
DOI: 10.2478/subbs-2024-0001

LEGITIMATION CRISIS OF CAPITALISM IN ROMANIA: SOCIAL DYNAMICS AND IDEOLOGIZED KNOWLEDGE PRODUCTION

Sorin GOG[1]

ABSTRACT. This paper aims to investigate the discrepancy between the disaffected public perception of capitalism in Romania, as it emerges from past and current sociological survey data, and the construction of Romanian society as a social totality within mass media, the political sphere, and the social sciences. My argument is that these three spaces of knowledge production function according to ideologized criteria meant to stabilize capitalism in Romania and generate a distorted framework of understanding past and current social dynamics[2].

Keywords: capitalism, legitimation crisis, knowledge production, ideology, political system, mass-media, social sciences

In the last decade, a series of studies have been published that critically analyse the specificity of capitalist transformations in Romania in relation to the countries of Central and Eastern Europe (Ban 2014, 2016; Gabor 2010, 2012; Adăscăliței and Guga 2020). Romania is highlighted as one of the countries in the region where radical forms of neo-liberalism and extensive austerity reforms have been articulated (Bohle and Greskovits 2012; Bohle 2018). These economic transformations have generated profound discontent at the level of the Romanian society, starting from the social impact of these reforms on the general population (Adăscăliței 2017, Stoiciu 2012), and on workers' rights (Guga 2016), the limitation

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[2] This text has been elaborated and presented within the Socialist Vision Group, a network of public intellectuals focusing on researching capitalist transformations in Romania and articulating critical insights into social, political and economic processes.

of social dialogue and trade union activity (Trif 2013, 2016, 2016b; Adăscăliței and Muntean 2019; Stoiciu 2016), and the dislocation of the welfare state (Popescu, Ivan, and Raț 2016, 2019; Adăscăliței 2012), to the housing conditions and the transformation of housing from a social right into a profit-generating commodity for the growing real estate industry (Vincze 2017; Popovici 2020; Florea, Gagyi and Jacobsson 2018). Last but not least, they showed the impact these reforms had on vulnerable groups, which has led to a dramatic precariousness of their living conditions (Vincze, Petrovici, Raț and Pickler 2018; Vincze and Zamfir 2019; Raț 2005, 2013, Vincze, Ban, Gog and Friberg 2024).

However, there are still very few studies that explore the reactions to these economic transformations and how forms of critical contestation of these capitalist reforms were embedded within Romanian society (Gog, Braniște, and Turcus 2021; Cistelecan 2019, Trifan 2016, 2019, Gog and Simionca 2020). To what extent did the protests that took place in Romania in recent decades have an anti-systemic social component that could politically mobilize an anti-austerity discourse (Gubernat and Rammelt 2012; Stoiciu 2021) and demand the adoption of social protection measures? What forms of social criticism have developed in Romania in recent decades that question capitalist transformations and suggest alternative forms of societal transformation (Bogdan 2021, Sandu 2021, Mihai 2021, Cistelecan 2020, Poenaru 2017, Sîrbu and Polgar 2009)? Perhaps the most important theme that has remained relatively under-researched is how the population in Romania relates to these capitalist transformations and to the overall systemic changes that have taken place, not just to some specific processes that these changes have generated. To what extent are the neo-liberal reforms and projects that are still being promoted by various political forces, new and old, legitimized or contested by the Romanian society?

The three decades of post-socialist social and political sciences have generated very few critical studies on how the economic and social transformations underpinning the transition from a communist to a capitalist system were perceived at the level of the Romanian society. The rare references to the sporadic questions in sociological surveys that capture various aspects of the relationship to the economic transition are thematized in a caricatured logic, meant to ridicule 'retrograde mentalities' and the respondents who allegedly have 'communist nostalgia' and 'wish' for a return to a dictatorial regime. The critical issue to which social sciences have paid relatively limited attention is how we can sociologically explain the fact that there is a fairly common belief among the general population that the period before 1989 was better in many ways than the present one. To what extent should we see in these assessments a form of uncritical nostalgia for totalitarianism, rather than, instead, a form of contestation of the economic and social dysfunctions of the Romanian capitalist system?

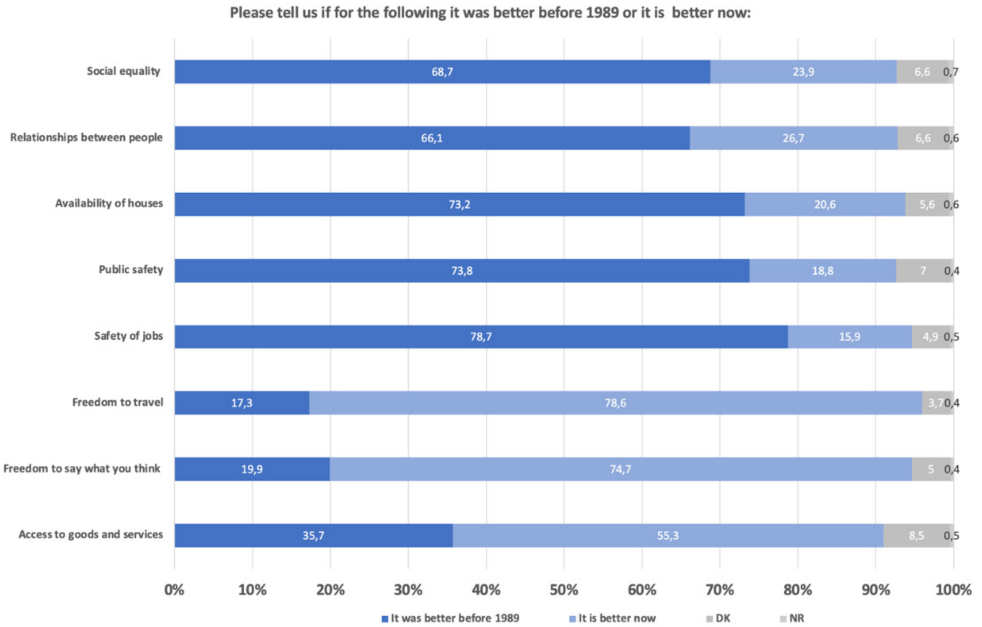
After more than three decades of capitalist transformations, there is a deep dissatisfaction within Romanian society with the social and economic transformations that have taken place. This state of affairs is not something new; various opinion polls conducted repeatedly in the 1990s highlighted the dominant belief within Romanian society that the direction we are headed is wrong (see Zamfir 2004:36 for a brief overview of the period 1996 - 2003). In 2010, an opinion poll conducted by IRES showed that 57% of the population believed they had a better life before 1989, compared to 21% who believed they fared worse and 15% who thought it was the same. 68% agreed with the statement that “the communist regime was a good idea, but poorly implemented”, compared to 21% who disagreed with this statement (IRES 2010). In 2013, an opinion poll conducted by INSCOP revealed that 44.4% of the population believed that life was better before 1989 than today, compared to 33.6% who thought that life was worse. 44.7% felt that the communist regime was a good thing for Romania, compared to 45.5% who saw the communist regime as a bad thing[3]. In 2023, in an INSCOP survey, the share of those who considered that the communist regime was good for Romania increased to 48.1%, while the share of those who thought that it was bad for Romanian society decreased to 42.2% (INSCOP 2023).

The FES survey - ‘Progressive Attitudes and Values in Romania’, conducted in 2022, confirms these data but allows us to analyse how Romanian society relates to the period before 1989 according to several dimensions[4]. These are reproduced in Graph 1. We can observe that, when it comes to social and economic aspects, such as access to housing, job security, public safety, relationships between people, or equality, an overwhelming majority consider that before 1989 it was better. For example, regarding job security, 78% believe it was better before 1989. On the other hand, regarding values related to freedom of movement and freedom of expression, the majority think it was better after 1989. The percentages are also very high, varying between 74 and 78%. What is important to highlight is that the data shows, in fact, that the population relates to the communist period in a reflexive manner, which generates nuanced positions that differ from those of many political scientists and public intellectuals who thematize the two periods in an antagonistic and radically contrasting way.

[3] In 2023, when INSCOP, repeated this survey and presented the results in comparative perspective with the data from 2013, it presented these results the other way around. The differences are not significant and reveal the fact that there is no majority in the Romanian society that believes that the capitalist period is better than the socialist one. See INSCOP 2023.

[4] This analysis uses a sociological survey conducted by Friedrich Ebert Stiftung Romania, based on a representative sample of 3666 respondents. For a detailed presentation of this data please see Bădescu G., Gog S., Tufis C. (2022) - Progressive attitudes and values in Romania, FES.

Graphic 1. Public perception of before and after 1989 period



Source of data: FES Survey - Progressive Attitudes and Values in Romania

The FES sociological survey clarifies which components are assessed positively (the socio-economic dimension) and which are perceived as being worse (the restriction of freedom of expression, thought, and movement). In previous ethnographic studies (Gog, 2024), we have shown that these perceptions have a real foundation and that for specific socio-demographic segments, such as workers active during the socialist period in industrial sectors, we can highlight the salary, housing, living standards, etc. -advantages they had during the socialist period and which, as a result of the neo-liberal reforms of the 1990s, deteriorated dramatically, generating a broad process of downward social mobility. The perception of the socialist period varies greatly depending on the class position of the respondents. In previous analyses of the results of this sociological survey, we have highlighted the fact that people with high incomes and a high educational level tend to see the period after 1989 as better (Bădescu, Gog, Tufiș 2022:21). The same can be said if we analyse these perceptions according to age generations. Older people who lived during both periods tend to see the period before 1989 more favourably. However, despite these differences, still most people with higher education believe that from a socio-economic point of view, it was better before 1989, and similarly when it comes to the younger generations who were socialized predominantly before 1989 (Bădescu, Gog, Tufiș 2022: 18-21). These valuations are extremely plausible considering that the period 1959 – 1973 was the period with the highest economic growth in Romania, with industrial GDP recording an increase of over 500% with direct consequences on the improvement of living conditions (Voinea et al. 2018:37). Murgescu (2010:352) shows that the urbanization process that took place during the communist period generated a considerable improvement in living conditions, both from the perspective of housing conditions (compared to rural areas) and from that of equipping these homes with the electrical household appliances necessary for a decent life.

It is important to emphasize that how the pre-1989 period is remembered is firmly anchored in the class position that the respondents have. We will approximate this class structure starting from the respondents' estimates regarding their income and the declared educational level - which influences the professional and occupational path of the respondents. We can observe from the analysis that the perception that the pre-1989 period was better from a socio-economic point of view is stronger in those social strata that are currently struggling the most. From the tables below, we can see how people who declare that their income is not enough for the bare necessities or is enough just for the bare necessities have significantly higher rates of favourable perception of the pre-1989 period (as being better from a socio-economic point of view than the present) than those who declare that their income is enough for a decent or comfortable life. Although this variable does not measure the actual incomes that respondents have or the material situation of the respondents (what constitutes a decent living or not varies from one person to another and is thus a relative indicator), it allows us to approximate the social categories that are currently experiencing economic difficulties.

We can notice a similar pattern in the case of the education dimension, where we observe that people with secondary and vocational education tend to see the period before 1989 as being better to a greater extent than people with higher education do. This is also visible in how the professional position of the respondents structures these perceptions. Pensioners, employees, and housewives generally consider that the period before 1989 (the socio-economic dimension) was better than the present, to a greater extent than students, freelancers, employers, and entrepreneurs (p = .001).

Tabel 1. Percentage of people who believe that before 1989 it was better in regards to various dimensions based on perceived income (non-responses excluded)

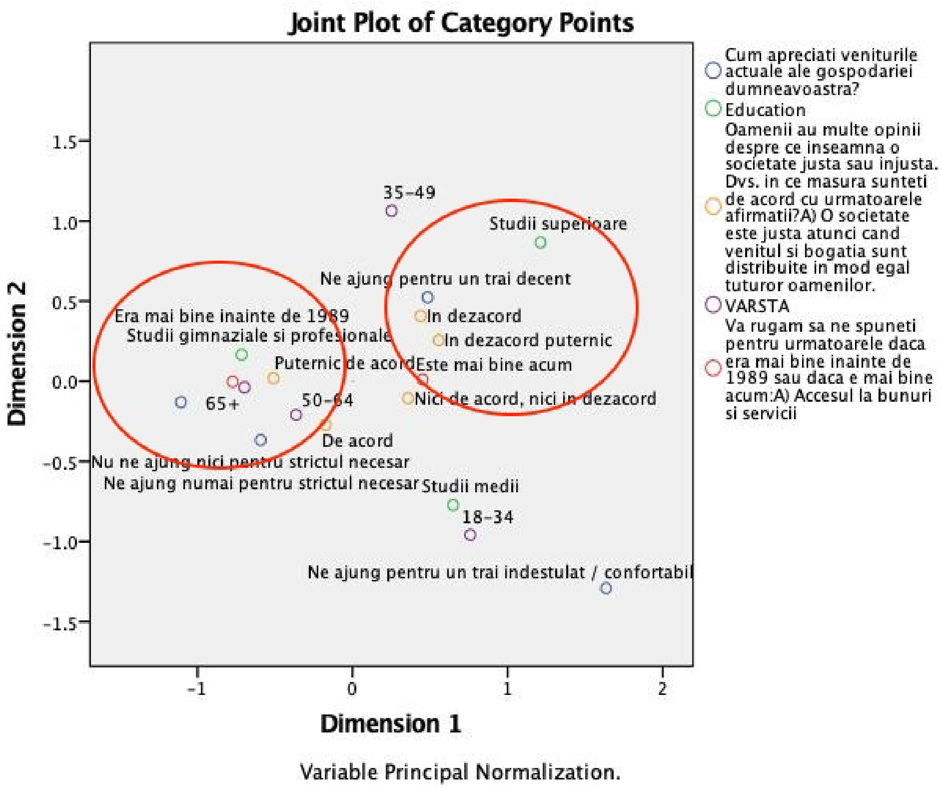
	Income not enough for bare minimum	Income enough only for bare minimum	Income enough for a decent living	Income enough for a comfortable living
Access to goods and services	65.2%	45.7%	32.3%	14.9%
Freedom to say what you think	44.7%	24.5%	15.1%	10.1%
Freedom to travel	41.7%	21.9%	11.7%	6.8%
Safety of jobs	93.7%	86.4%	80.7%	69.9%
Public safety	89.9%	83.9%	77.5%	54.4%
Availability of houses	89.0%	80.4%	75.9%	61.1%
Relationships between people	82.5%	77.3%	66.5%	52.2%
Social quality	89.1%	77.6%	71.5%	51.4%

Source of data: FES Survey - Progressive Attitudes and Values in Romania

With the help of a multiple correspondence analysis, we can better visualize these class dynamics. There is a relatively high association between socio-economic status (measured here by education, age, and subjective assessment of one's income) and the perception of the socialist period (the dimension of access to goods and services). A solution with two dimensions explains approximately 62% of variance; the first dimension measured the perception of the period before and after 1989 and the egalitarian distribution of resources (Cronbach's Alpha.606); the second dimension measures the class positions (Cronbach's Alpha of .208) We also introduced into the analysis a variable related to the perception of what social justice means, in this case, the positions towards the equal distribution of income and wealth. The socialist period is generally remembered as relatively egalitarian compared to the post-December period, in which social inequalities increased dramatically.

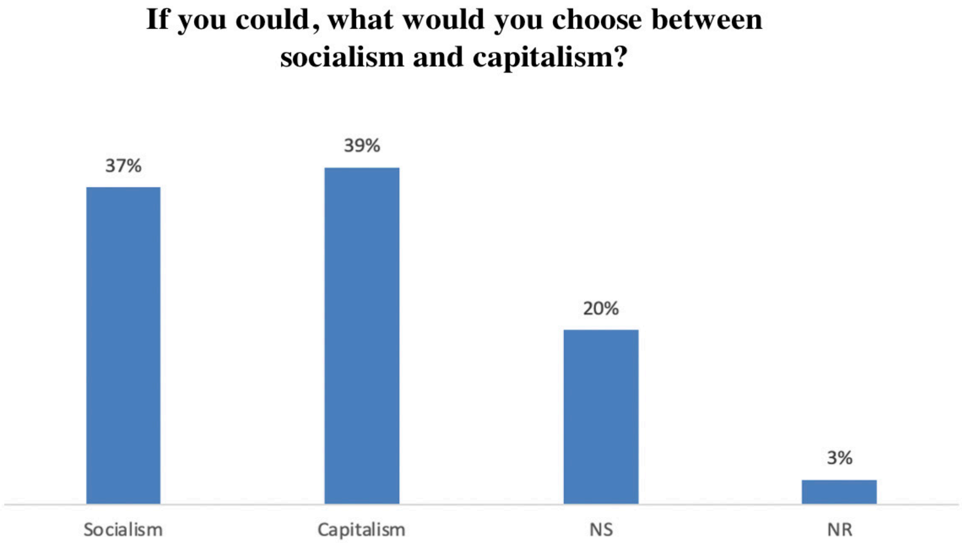
We can notice that the socialist period is generally seen as better among people with low and medium levels of education who have difficulty managing their income. They constitute the majority within the Romanian society. The perception that the period after 1989 and the disagreement regarding the fact that a just society means an egalitarian distribution of resources is generally associated with people with a suitable material situation and higher education.

Graphic 2. Multiple correspondence analysis focusing on perception on living conditions before and after 1989 period



Another important dimension that enables us to highlight the crisis of legitimation of capitalism is the analysis of the actual support for this political system. This clearly shows the fact that a capitalist society does not have such great support and legitimation within the Romanian society. When asked about the option for socialism and capitalism, only 39% would opt for capitalism, 37% would opt for socialism, and 20% would not know which to choose. In 2018, the IRES study 'Capitalism and Society: Romanians' Perceptions of Capitalism' showed that 50% of people who were adults during the communist period would choose socialism, compared to 44% who would choose capitalism. In 2019, in a sociological survey conducted by the Bureau for Social Research, to the question 'What is better for Romania now?' obtained the following frequency distribution: a capitalist market economy (41%), a socialist economy directed by state structures (13%) and a mixed economy, capitalist-socialist (26%). 20% of respondents did not know what to answer. A year later (2020), the same research institute measured the cumulative opinion towards two ideological blocs: socialism and social democracy, on the one hand, and capitalism and Christian democracy, on the other. 58% of respondents had a favourable attitude towards socialism and social democracy, while 30% had an unfavourable attitude. For capitalism and Christian democracy, the frequency distributions were 56% of respondents having a favourable attitude while 30% had an unfavourable attitude. The survey also consistently shows that a favourable attitude towards socialism and social democracy is associated primarily with voting for PSD (Social Democratic Party) and Pro Romania. In contrast, a favourable option for capitalism and Christian democracy is associated with the Green Party, PMP (People's Movement Party), and PNL (National Liberal Party). Voting dynamics highlight in this case plausible political vectorizations.

Graphic 3. Option for socialism or capitalism in contemporary Romanian society



Source of data: FES Survey - Progressive Attitudes and Values in Romania

There is, of course, a need for a more precise methodology that would allow a more accurate operationalization of socialism and capitalism, depending on economic social dimensions, political values, etc., but what appears very clearly in these sociological surveys is the fact that the Romanian capitalist system is far from having a strong legitimation within Romanian society. Romanian society's perception is that capitalism has failed to generate the economic and social well-being it promised and that a large segment of the population believes that they had a better life before 1989. These dynamics regarding the memory of the past are also reflected in how future political alternatives and options are imagined. The data is plausible and consistent with previous research.

With the help of a homogeneity analysis, we can draw a clearer picture of the fact that support for capitalism is associated with how competitiveness is valued or not, how entrepreneurs are represented, and whether they consider that access to health services should be differentiated according to each person's contribution (in a meritocratic sense). A solution with two dimensions explains approximately 60% of the variance (Cronbach's Alpha .455 and .386). We also introduced the self-perception of adequate/ inadequate of income into the analysis. From the graph below, positions in favour of capitalism are associated with a positive attitude towards entrepreneurs, a positive valuation of competition and the perception that this is beneficial for society, and last but not least, with meritocratic attitudes regarding accessing healthcare. These positions are expressed mainly by people who consider their income enough for a good and good life. Conversely, the option for socialism is associated with the dominant perception that competition is harmful, with a negative perception towards entrepreneurs, and with the desire that access to the health system should not be differentiated according to contribution. Most of these people come from the categories that consider their income sufficient only for the bare necessities.

An interesting aspect to note is that the percentage of 'do not know' answers to the socialist/capitalist question increases among people who have less education (Table 2) and are struggling financially. The people most marginalized and disconnected from the opportunity structures of contemporary society are also the people whose political beliefs are least crystallized in this regard. They are also the least interested in politics and do not intend to vote in the next elections.

Graphic 4. Multiple correspondence analysis focusing on socialism/capitalism option

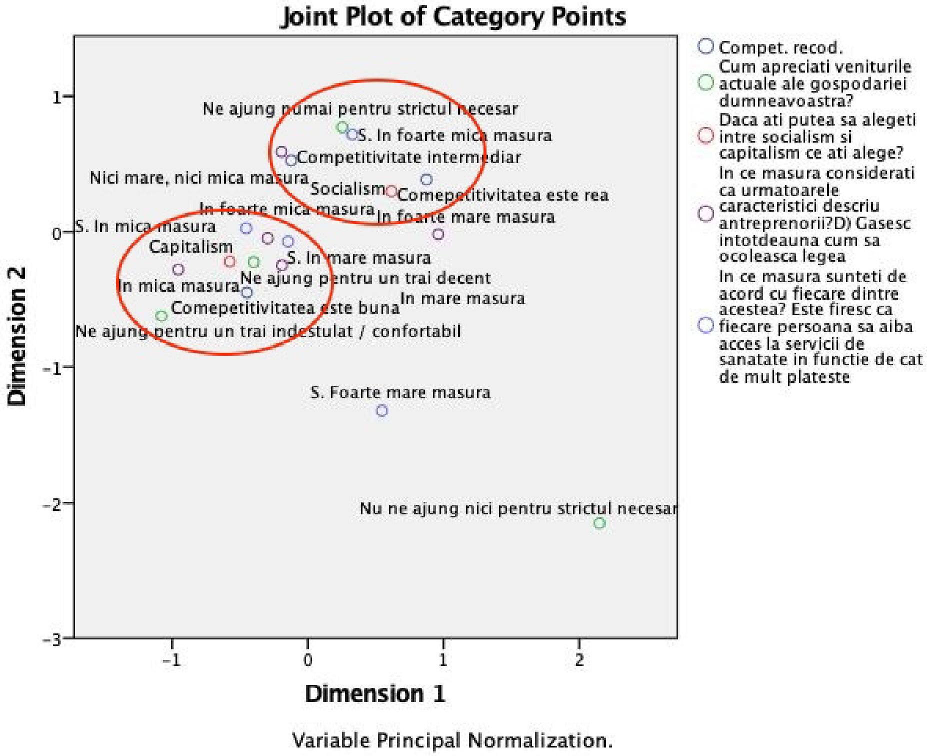


Table 2. Support for socialism or capitalism according to levels of education

	Pre-High School Education	High School and Post-High-School Education	University and Postgraduate Education	Total
Socialism	41.1%	35.6%	26.7%	37.8%
Capitalism	33.6%	42.8%	52.9%	39.6%
Don't know	22.2%	20.0%	15.7%	19.9%
No reply	3.„%	1.7%	4.7%	2.7%
Total	100%	100%	100%	100%

Source of data: FES Survey - Progressive Attitudes and Values in Romania

This contestation of capitalism should not be necessary understood as a support for left-wing positions or parties. This is visible if we analyse the options of the segment of the population that feels closer to the AUR party (Alliance for the Union of Romanians, the acronym means 'Gold' in Romanian). Although most who would opt for socialism do not feel close to this political formation, we can still see among them a slightly more significant association than the population segment that opts for capitalism. 19% of people who would choose socialism feel very close to this political formation compared to only 11.3% of those who choose capitalism.

Table 3. How close do you feel you are to AUR party based on socialist or capitalist option?

	Very close	Close	Somewhat close	Not close at all	NR	TOTAL
Socialism	7.1	11.9	23.6	56.4	1	100
Capitalism	2.7	8.6	19.2	69.3	0.2	100

Source of data: FES Survey - Progressive Attitudes and Values in Romania

We can see the same dynamics if we analyse support for a military regime in relation to the option for socialism and capitalism. It is important to mention that the data was collected before the outbreak of the war in Ukraine. 33% of those who opted for socialism believe that it is good and very good for Romania to be led by a military regime, while only 25% of those who opted for capitalism support this. Both camps have high values, but the order of magnitude is significantly higher among people who would opt for socialism. Structural dissatisfaction with capitalist transformations and the option for socialism do not automatically translate into democratic left-wing options. A significantly large segment of Romanian society opts for authoritarian regimes, which present potential proximity to non-democratic political regimes.

Table 4. How good do you think it is for Romania to have a ruling military regime?

	Very good	Good	Neither good, but not bad either	Bad	Very bad	Don't know	NR	TOTAL
Socialism	13.4	19.9	8.5	21.2	28.8	7.8	0.4	100
Capitalism	14.5	10.7	8.6	26.1	35.8	4.2	0	100

Source of data: FES Survey - Progressive Attitudes and Values in Romania

Right-wing populist parties capitalize on this popular dissatisfaction with economic transformations and channel anti-system sentiments towards a nationalist and quasi-fascist agenda. This was also clearly observed in the 2024 presidential and parliamentary elections, when the far-right candidate, Călin Georgescu, and AUR, mobilized many people with a precarious financial situation. The IRES study conducted in December 2024 regarding the hypothetical voting intention in the second round, annulled by the Constitutional Court, shows that Călin Georgescu would have won the elections by a wide margin and would have been supported predominantly by people with low educational levels, people living in rural areas and the younger generations (IRES 2024).

The emergence of the far right and neo-legionarism in Romania and its relation to structural dissatisfaction with capitalist transformations and the social dislocations they produced is not new. Tudor Bugnariu documented in his research on workers in Cluj during the interwar period how the fascistization of certain factions of workers took place against the backdrop of crises of capitalism (Bugnariu, 2013). In the 1980s, when brutal forms of ethnonationalism and protochronism were reasserting themselves under Romanian communism, rhetorically diminishing the role that fascism played in Romania, Bugnariu reminded sociologists of the formation dynamics of the Legionary Movement and how they sometimes capitalized on an emerging 'incipient anti-capitalism' among social categories affected by the crisis after the first world war (Bugnariu, 2013b).

In Polanyian tradition, we must understand the emergence of radical right-wing movements as a result of the dysfunctions of the market economy (Polanyi, 2001, p. 248) and the crises that capitalism generated (Dale, Homes, and Markantonatou 2019:163). However, the role of these movements is not to dislocate capitalism but to stabilize it in an anti-democratic way (Lim, 2023; the same argument is also developed in Bugnariu, 2023b). The criticism in Romania of multinational corporations and 'globalist' values in favour of indigenous capitalism, accompanied by corporatization, mysticism, and nationalism, represents a fascist reiteration not only of processes triggered by past systemic crises but also of what is happening in other illiberal countries in Central and Eastern Europe (Kalb, 2019; Antal, 2019; Scheiring, 2020). Polanyi articulated this dynamic very clearly in 'The Essence of Fascism':

> *"By denouncing Socialism and Capitalism alike as the common offspring of Individualism, it enables Fascism to pose before the masses as the sworn enemy of both. The popular resentment against Liberal Capitalism is thus turned most effectively against Socialism without any reflection on Capitalism in its non-Liberal, i.e. corporative, forms. [...] First Liberalism is identified with Capitalism; then Liberalism is made to walk the plank; but Capitalism is no worse for the dip, and continues its existence unscathed under a new alias."* (Polanyi 1935:367)

Ideological obstructions and the spaces of knowledge production on the Romanian society

Given the massive social impact that the economic reforms of the last 30 years have had on Romanian society, the results revealed by the FES sociological survey should not generate surprises. As we have shown, they are consistent with other sociological research conducted in recent years, which highlights the deep dissatisfaction with the capitalist transformations in Romania and the dislocations that it has produced. In this context, an important question we must address is the following: Why is there so little notice of these critical positions regarding the capitalist transformations, and the way in which the transition was experienced at a societal level? How can we explain the fact that in a democratic society, political positions regarding the social effects generated by the capitalist political economy are not more readily discussed and debated in the public space?

A hypothesis would be to analyse the spaces in which society as a whole is symbolically mediated and to interrogate the dynamics and mechanisms that structure the representational policies and knowledge production regarding the Romanian society. To what extent are they explicitly or implicitly regulated ideologically (Horkheimer, 2014; Cook, 2001; Bogdan, 2019), a fact that can obstruct the coagulation and public manifestation of the dissatisfactions with the capitalist transformations in Romania? Here, we refer primarily to those social spaces that generate representations of a social totality and discursively make explicit the everyday instantiations of the existing socio-economic order. For example, and this often happens in public space, when dissatisfaction is expressed with the economic effects of the transition, numerous experts classify these 'opinions' as a form of nostalgia or as the expression of retrograde positions. In this case, we are talking about how scientific expertise calibrates segments of social reality and ideologically re-scales them in accordance with its own political positions. Another way of ideologically re-inscribing the representations of society is to identify wrong causalities for the studied dysfunctions. An example in this sense is the massive migration from Romania which was rarely thematized in the first two decades as a direct consequence of capitalist reforms. The role of the examination below is to circumscribe the main social spaces in which Romanian society is discursively constructed and to articulate research hypotheses in relation to what Althusser called the 'ideological apparatuses of the state' and their multiple instantiations at the educational, cultural, political, legal, etc. levels. (Althusser 2014:242)

First, the extent to which this ideological obstruction occurs at the level of the mass media should be explored. The Romanian mass media often reflects the socio-economic problems faced by the population but rarely critically associates them with capitalist transformations per se. Romanian journalism and editorial policies are almost entirely pro-capitalist and tend to support a project of 'reforming' society in the sense of a liberalization aimed at consolidating the market economy. It is interesting to follow the various media monitoring reports that constantly signal political influence on editorial policies, the absence of transparency, the threat to journalistic freedom, the importance of media pluralism, etc., all objective and important problems, but these reports discuss very little about how much of the written and audio-visual mass-media has been monopolized by capital. The advertising industry market in Romania, for example, reached a fabulous figure - 683 million euros in 2023 (Newman et al., 2024: 100). The report 'The State of the Romanian Media in the Super-Election Year 2024' written by the Centre for Independent Journalism estimates that of the commercial revenues collected, only "*less than 1% goes to editorial projects that also perform a public service (surveys, investigations, coverage of the political, social and economic agenda, etc.*)" (Lupu, 2024, p. 13). The primary stake is to make profits. We have detailed studies on the consumption dynamics of different types of media, types of shows or articles, the target audience according to generation, area of residence, etc., and the capacity of these media niches to constitute markets for the advertising industry[5]. The primary role of the media is to produce a flow of consumers and generate profit from these niches. For the capitalist mass-media the goal cannot be to challenge the market economy and the dysfunctions it generates, since making a profit from media production is precisely its main function.

Because of this, the Romanian media has become an important target for foreign direct investment (FDI) in the last three decades. A relevant example is the Ringier Media Trust, which owns hundreds of newspapers, televisions, and radios worldwide. In Romania, some media brands managed by this corporation are Avantaje, Elle, Unica, Viva!, TV Satelit, Libertatea, eJobs, imbobiliare.ro, Stiri curate, etc[6]. Another example is Central European Media Enterprise, boasting 43 regional television channels. According to their estimates, this consortium has a total audience of 49 million people in 6 Central and Eastern European countries. In Romania, for example, they have the following investments[7]: Pro TV, Pro Cinema, Acasa, etc.

[5] https://mediafactbook.ro/media-market/sectors, Last accessed on 29 December 2024
[6] https://digital.ringier.ro, Last accessed on 29 December 2024
[7] https://www.cetv-net.com/countries/romania, Last accessed on 29 December 2024

My argument here is undoubtedly not that foreign corporations control the reality of Romanian media. There are also important media companies with Romanian capital, e.g., Intact Media Group or Realitatea Media, with large turnovers. What is important to highlight, however, is that, for the most part, the media is not publicly owned and does not have a public function. Therefore, the primary stake of the media is not to defend the public interest or to reflect public dissatisfaction with the capitalist status quo. In the report prepared by the CNA (National Audiovisual Council) for 2023, most audiovisual licenses granted until that date are owned by private commercial companies[8]. Public audiovisual licenses are an insignificant minority. In this regard, we can also analyse the audiences provided by BRAT (Romanian Audit Bureau of Circulation). It can be easily observed that these private commercial companies hold the absolute majority in producing Romanian media realities[9]. This is true not only in the television and radio segments where we find control of capital but also in the written press, in the digital press, and, of course, in the area of websites. The primary stake of these private media companies is to make a profit in relation to the investments made, as Adrian Sârbu, the president of one of the largest local media corporations, says in an interview:

> “In the last 25 years, I have had the chance, the power, and the talent to build private institutions of public stature, PRO TV, CME, Mediapro, Mediafax, etc., which have employed tens of thousands of Romanians, offering them the opportunity for a career. I have respected this country’s laws, promoted strict principles of corporate governance, and never encouraged the criminal spirit in my companies. I have created generations of professionals. I have worked simultaneously with hundreds of managers, delegating and sharing my ideas and what I have gained with them. I was the only Romanian to advance to the position of CEO of a public American company. **I have created hundreds of millions of dollars of value for my shareholders and myself.** The companies under my control or management have paid hundreds of millions of euros in taxes to the Romanian state in the last ten years alone.”[10] (emphasis mine)

The mass-media’s function of representing society has been deeply captured in the last three years by a capitalist logic whose aim is the ideological reproduction of the system and, indeed, not to challenge it. The population’s dissatisfaction

[8] https://www.cna.ro/Situa-ii-privind-licen-ele,6771.html, Last accessed on 29 December 2024

[9] Internet traffic: https://www.brat.ro/sati/rezultate/type/site/page/1/c/all, Newspaper circulation: https://www.brat.ro/audit-tiraje/cifre-de-difuzare, radio audience: http://www.audienta-radio.ro/userfiles/items/Audienta%20radio%20-%20Valul%20de%20vara%202022.pdf TV audience https://www.arma.org.ro/wp-content/uploads/2022/12/ARMA-2022_11.xlsx, Last accessed on 29 December 2024

[10] https://www.mediafax.ro/social/adrian-sarbu-a-fost-retinut-pentru-24-de-ore-cazul-mediafax-fabricat-la-comanda-lui-pontaghita-13799960, Last accessed on 29 December 2024

with the capitalist system is recoded through an ideological filter and re-articulated as dissatisfaction with the corruption of the system, the inability of the political class to pursue the interests of society, or the lack of professionals and experts in key positions to ensure the proper functioning of administrative structures, as it happens in the West etc. The fundamental assumption behind this ideological recoding is that solving these problems will improve the entire system's functioning. However, in the view of the vast majority of the private media in Romania, this system, a capitalist one, is intrinsically good. The idea that a vast part of these dysfunctions are generated by the processes of capitalist accumulation or by how the interests of capital constantly lead to a dislocation of the welfare state are systematically evaded. There is, therefore, a significant gap between how the media represents Romanian society and the real and deep dissatisfactions that exist at the level of the Romanian society. The mediating function of representing society is ideologically distorted; the screen through which society sees itself in the mass-media is deeply colonized by the interests of capital and capital investors, for which the media must generate profits and defend an implicit political economy that can guarantee the return on investments.

Table 5. If next Sunday general elections would take place, with what party would you vote?

PSD	20.7
PNL	7.2
USRPLUS	4.7
AUR	6.2
UDMR	1.5
PMP	.6
Other	2.7
I would not vote	22.8
Don't' know	26.6
NR	7.0
Total	100.0

Source of data: FES Survey - Progressive Attitudes and Values in Romania

Another important space where an ideological blockage of representing society occurs is the political one. Previous studies (Badescu, Gog, Tufis, 2022) have highlighted that we have an electorate open to left-wing policies in Romania. However, we do not have political parties that represent this electorate. The data from the FES survey highlight the fact that in Romania, there is a large segment of the population that does not feel represented by any existing party. 22% would not vote, and 26% do not know who to vote for. Almost half of the population feels not represented by existing parties.

These dissatisfactions occur in the context in which, since the 1990s, a right-wing political hegemony has emerged in Romania, largely reproduced within the parties that claimed to be left-wing as well. Vladimir Borțun (2024) highlights in his analyses how PSD, for example, has consolidated in Romania the interests of local capital and an economic agenda aimed at supporting private initiatives, as well as public policies that have led to the weakening of the welfare state. An analysis of the new socialist parties points out that they are frozen in an irrelevant neo-Ceausescu-alike project or have a deeply diluted left-wing message without the capacity to mobilize the masses. Diana Mărgărit (2021) follows the evolution of the parties that declare themselves left-wing - the Social Democratic Party, the Romanian Workers' Party, the Socialist Labor Party, and the micro-parties that emerged from them, the United Socialist Party, the Romanian Workers' Party, etc. and shows the fact that they have been a failure in terms of addressing the dysfunctions generated by capitalist structural reforms. Those that came to power (PSD) have failed to generate an alternative to the neo-liberal development model, to reduce social inequalities, or to promote comprehensive social policies; those that remained extra-parliamentary have been entirely irrelevant and sometimes inadequate in mobilizing social discontent.

Political parties are one of the primary sources of generating an image of the Romanian society as a whole, and they have, of course, multiple territorial and national institutional levers to amplify these political discourses that imagine societal dynamics of development. It is important in this context to point out the vast amounts that parliamentary parties receive from the state budget (253 million lei in 2021, 234 million lei in 2021, 256 million lei in 2022, 227 million lei in 2023 (Pârvu & Vasiliu, 2023) and an absolute record figure in 2024 of 386 million lei (Pârvu, 2024). It is also important to mention that, by far, the parties' most significant category of expenses is what the Permanent Electoral Authority calls 'press and propaganda.' In 2024 alone, 214 million lei were spent on this category (without counting the extra-budgetary sources that parties have), which does not include the amounts spent on public opinion polls, production and dissemination of electoral videos, events, etc. The discursive capacity of political parties to produce an image of Romanian society, as well as the resources they have at their disposal to institutionalize such an image, explains why within the current parliamentary party system we encounter so few critical interrogations of the capitalist political economy in Romania.

Another important space where we should investigate the existence or not of an ideological blockage in the future is that of the social sciences in Romania. In the last 30 years, this field has generated the most projections regarding what Romanian society is as a totality, what the main directions of transformation are, and how dysfunctions and broad social discontents should be interpreted. Particular attention should be paid in future studies to the 'transitology' that marked especially the first two decades of research and scientific production in the social sciences, within which we can observe a relative absence of connecting the segments investigated to the new broader political economy.

Academic spaces are primarily professionally formative spaces that prepare and consecrate individuals who will occupy important leadership positions in Romania's political, economic, and administrative apparatuses. To what extent do these spaces ideologically reproduce the capitalist system? Do they generate forms of knowledge that critically interrogate the political economy that structures the professional fields for which it prepares students? Here, we should analyse the study programs, the curricula used, the course materials, the recommended bibliography, the scientific production of the teaching staff, etc., and interrogate to what extent this develops a critical perspective on the capitalist political economy.

Academic spaces (universities, academic societies, institutes, research and social intervention centres) are also relevant because this is where a good part of the expertise, reports, and recommendations for public policies are produced. It is already a common practice for the local state and national governance structures to base their development strategies and policies on academic expertise or NGOs in which people with academic training work. The important research question that we need to address in analysing these productions of expertise that are being provided to governance structures is what types of problems they address, and what is the broader framework in which they place the recommendations they develop? For example, given the housing crises that local administrations face and the numerous development strategies produced by the academic environment which is the dominant perspective - that of urban regeneration through stimulating the real estate industry and selling houses for profit or encouraging investments in public housing or cap on the rents? Do the recommended public policies reproduce the interests of capital and try to generate new investment spaces to generate profit, or do they aim to improve the population's living conditions instead?

Expertise is never strictly technical; it is embedded in ideological options, and its implementation presupposes specific political economy decisions.

Last but not least, academic spaces in Romania are important because fundamental social research is produced here focusing on the problems facing Romanian society, and therefore, they are a significant source of narratives on how society is represented as totality. Looking back at how the social sciences (sociology, economics, political science, social work, administrative sciences, psychology, etc.) developed in post-socialist Romania, it is essential to analyse the extent to which they were marked by an ideological obstruction in the analysis of the adverse effects that the transition had on the population of Romania. To the extent that it managed to inventory these dysfunctions, to which systemic factors did it predominantly attribute their emergence? To the communist legacy, Balkan Romanianness, insufficient modernization, global gaps, the new capitalist political economy, etc.? In what type of epistemology are embedded the research questions and the analyses carried out?

In many of the studies produced in the first two decades of transition, the capitalist economy and the consolidation of a capitalist statehood have not been methodologically taken into account as variables that can structure the social processes studied. There are, of course, notable exceptions, such as the studies of Vladimir Pasti in the 1990s, however, overall, the critical analysis of the transition that N.N. Constantinescu made so remarkably in the 1990s has been too little continued and deepened. We now have the critical distance necessary to problematize the ideological assumptions that structured the social sciences field's genesis in post-socialist Romania.

The field of political economy from Romania was one of the main spaces that analysed and guided the transition. A large part of this field's scientific and academic production generated explanations regarding social dysfunctions in terms of an insufficiently well-implemented capitalism. We can see this both in the transition economists and contemporary economists concerned with the successful integration of Romanian capitalism into global capitalism. Ulm Spineanu, for example, known to the general public for his portfolio as Minister of Reforms in Victor Ciorbea's cabinet, had in the first post-1989 decade a prolific publishing and teaching activity regarding how the transition should unfold (Spineanu 1995, 1996, 1999). Spineanu was a university professor specializing in macroeconomics. Still, he also held important positions in the expertise of emerging capitalist entrepreneurship in Romania; for example, he was the president of the General Union of Industrialists of Romania (employers' confederation). Also, in the area of economic expertise, he was a member of the leadership of the Romanian Society of Economists (SOREC). He wrote numerous books on transition (mainly - 'Transition: let us stop spreading illusions, 1999), and through his institutional positions, he played an important role in generalizing his vision of the trajectory that Romanian society must follow to become a 'functional' one.

The macroeconomic texts written by Ulm Spineanu have a strong poetic and ideological cadence; the constant impression you get is that he recites economic truths, he does not perform actual analyses. The conclusion of each section is always the same - the need to achieve capitalism at all costs and to hasten the 'rehabilitation' of the Romanian economy. The structural solution to the economic difficulties that Romania was facing was primarily aimed at transferring a significant part of state property to the private sector and the active involvement of the state in creating markets and stabilizing them. In order to generate this process of transferring public property to private entrepreneurs, the state could, within this vision, even pay money by covering the outstanding debts of some enterprises in order to facilitate their privatization (Spineanu 1999:35). One of the important problems that the reformers of the system had to avoid, according to him, was that of not carrying out a simple reform of socialism, the objective was pure capitalism, and for this, it was important to completely dislocate state property, to achieve a thorough restructuring of the economy and 'complete liberalization' (Spineanu 1999:37). It is very easy to see how these texts articulated a new social ontology - one in which society had to be reformed alongside with the economy, the market had to become the full test of any public policy, and everything had to be adapted around values that stimulate competition and market competitiveness (Spineanu 1999:72).

In retrospect, we know what an economic and social disaster the neo-liberal reforms implemented by the CDR government between 1996 and 2000 generated (Ban 2014:160-167), when Ulm Spineanu was writing these texts to support them. It is important to emphasize that this economic collapse with tremendous inter-generational effects was a calculated and assumed decision. Spineanu spoke at this time of the need for a profound shock therapy that must be implemented quickly and 'multi-factorially' (Spineanu 1999:271), even if it will bring about a significant social impact and economic depression (Spineanu 1999:72). The social costs were understood as secondary to the historical necessity of implementing capitalism. What is very clear from these programmatic texts is that the need of creative destruction and professional reconversion of workers (Spineanu 1999:72) are inscribed in the firm conviction, a-la-Fukuyama, that we are passing through an end of history and that the total implementation of capitalism is a technocratic truth that cannot be contested.

We see the same type of ideological understanding of economic expertise later on; it is not the prerogative of a lack of experience in the early post-socialist economic field. Lucian Croitoru, for example, researcher, professor, expert of the International Monetary Fund, and advisor to the Romanian National Bank, argues in his studies ('The End of Regulation and the Last Regulator', published in 2013 and 'In Defence of Markets', published in 2012) that a capitalist society is actually in line with human nature. Private property ensures the proper functioning of free markets, allowing for the articulation of competitiveness between free agents, leading to innovation and productivity. Of course, this facilitates a true democracy (Croitoru 2013:98). This type of ultra-liberalism is constituted as an epistemological device that views with scepticism state regulations, which are seen as exogenous to the free market economy (Croitoru 2013:20). This approach is very critical of the budget deficits generated by the expenses that the state registers and of the social policies that it implements. Moreover, here we can see again how the analysis of the transition in Romania is inscribed in the same philosophy of history inspired by the writings of Fukuyama (Croitoru 2013:39) that sees capitalism and the deregulated free market as a quasi-implacable direction of development, regardless of the social violence it produces.

What is problematic in this type of expertise is that it embeds a political and ideological option in a scientific language that had major effects on the entire Romanian society. The series of economic arguments compels the authors to infere how society should be rescaled (in a register of competitive adversity and not of social solidarity) and also about what human nature is (freedom, competition, and resilience and not social and material security). The deep dissatisfaction that Romanian society experienced regarding the economic transformations in the first two decades of transition was de-legitimized by an expertise that presented itself as scientific and closed the possibility of an honest political debate on redistribution and rescaling of the economy. We see precisely the same types of reactions and expertise today whenever proposals for progressive taxation of capital or an increase in the minimum wage appear in the public space. The argument that dominates the media and the positions of the vast majority of the economic establishment is that this would generate an economic catastrophe and that companies would leave Romania.

My argument here is not that Romanian economists do not develop anti-capitalist positions but that they do not articulate forms of reflexivity in economics that would allow the inclusion of various perceived dysfunctions at the societal level in an alternative political economy model. The crises that capitalism generates are understood paradoxically, but ideologically coherently, as the result of insufficient capitalism. A counter-example to this ideological closure is perhaps the writings of Daniel Dăianu, university professor, former minister of finance, former MEP, BNR advisor, and member of numerous economic academies. Unlike mainstream Romanian economic thinking, Dăianu has a significantly more complex positioning in the first two decades of transition (Dăianu 2000, 2004, 2006, 2009). He knows that the integration into the European Union is not automatically a good thing and, therefore, cannot be presented as a messianic answer to the problems that Romanian society is experiencing; he understands very well the existence of varieties of capitalism and critically interrogates the type of capitalism that is implemented in our country (Dăianu 2009:127-128). He is also one of the few Romanian economists who states that the past communist society cannot be held responsible for all the dysfunctions generated by capitalism today (Dăianu 2009:131) and that there is a fundamental need for public goods that markets cannot provide. In the debate surrounding 'Letter to my Romanian friends',[11] in which G.M Tamas criticizes from leftist positions the similarities in Romania between middle-class Romanian liberalism and rising xenophobic nationalism, Dăianu showed that a post-capitalist critique is welcome for consolidating democracy. Dăianu's positions are certainly pro-capitalist, but he discusses the possibility of a multi-linear, non-Manichean history in which the practical contingencies of how capitalism is configured in Romania can be debated and criticized. It is a relatively different approach from the ideological unilinearity in which the Romanian political economy inscribed its extensive expertise and shaped public policies.

I bring up Dăianu's positions to highlight a type of nuance that has not existed for a long time in the radical pro-capitalist imaginary of the Romanian political economy. However, of course, Daianu's expertise also reproduces, in many cases, common ideological premises. For example, he is convinced that the rentier capitalism that has taken shape in Romania can be overcome by articulating an ethical capitalism. The economy's invisible hand cannot function without an ethical component, he says, that can substantiate a genuine transformation of Romanian society and a will to generate transparent and solid institutional mechanisms to reduce economic gaps in relation to the West (Dăianu 2004:157). That is why Dăianu believes we must implement a 'capitalism with a soul' (Dăianu 2009:130). However, if we look at the economic content of this ethical self-determination, we can notice the same policies of austerity, financial discipline, and continued privatizations (Dăianu 2004:160-161). Capitalism with a soul implemented after the integration into the European Union has not significantly diminished the vast social inequalities and territorial gaps. The poverty rate (Ban and Buciu 2025) continues to be critical. The references to Max Weber, who is often mentioned by the supporters of capitalism in Romania, and also by Dăianu, to highlight the need for an ethical dimension of capitalism,

[11] https://www.criticatac.ro/scrisoare-catre-prietenii-mei-romani/ Last accessed on 29 December 2024

are problematic because they ignore both the distancing that Weber had from the formal ethics of Protestantism, and the harsh criticism of the excessive rationalization that capitalism generates, to the point that it turns into an 'iron cage' (Weber 2003:190). Weber was not a supporter of 'ethical capitalism', as Dăianu believes, the role that ethics and a 'practical and rational way of life' (Weber 2003:17) had in the institutionalization of capitalist enterprises, should not be confused with the real stake of a Weberian analyses of capitalism, namely to highlight the dysfunctions that the autonomization of the capitalist system and bureaucratic hyper-rationalization generated.

Romanian political science has also often generated uni-linear capitalist narratives. Let us look, for example, at one of the most influential local political scientists - Cristian Preda, professor at the Faculty of Political Science at the University of Bucharest, former dean, department director, and doctoral supervisor. The epistemological filter for interpreting the political transformations generated by the post-socialist transition is firmly anchored around liberal-capitalist values, which credited private property and the market economy as the only solution for the moral reestablishment of Romanian society. Socialism and its obsession with ethical policies, consistent with a practice of social justice and capable of generating social solidarity, are constantly discredited (Preda 2001:34-35). Analysis of the dysfunctions registered in Romanian society is linked to the absence of a minimal state and a recurring criticism of the 'socialist' parties that want statism (Preda 2001:37-42). There is here a liberal vision present which considers that European social democracy (of the Swedish type) has exhausted itself. In his writings there is a profound ideological deformation that does not understand the fundamental nature of the policies of the first two post-socialist decades, which were in fact profoundly neo-liberal and constantly dislocated the welfare state (Preda 2001:150). This analytical framework is so deeply soaked in an anti-communist ideology that even the dynamics of the parties in Romania are marked in this analysis by a communist political mentality; this takes place in a context in which all parliamentary parties have contributed massively to the implementation of a capitalist political economy in Romania.

However, perhaps the most problematic is how sociology, as a science of Romanian society, has contributed to the consolidation of transitology as an academic field of pro-capitalist expertise. Perhaps nowhere in Romanian sociology do we encounter a more openly capitalist vision of transition than in the studies of Professor Lazăr Vlăsceanu, who devoted extremely professional and well-argued extensive monographs and articles written on this topic (Vlăsceanu 2001, 2007, 1995). Vlăsceanu formalized a systemic and comparative discipline in the Romanian academic field focusing on the transition the Romanian society was going through in the 1990s. His institutionalist perspective was intended to give social and economic policies rigor and depth and to anchor them in global and post-modern social-economic realities. His vision, however, was deeply inspired by the Washington Consensus, a defining political project for the neo-liberal structural reforms implemented by the International Monetary Fund and the World Bank. The main problem that Vlăsceanu identifies is that macroeconomic policies aimed at establishing a new capitalist economy are insufficient if they are not firmly anchored in political, societal, and cultural structures (Vlăsceanu 2001: 119, 126). The minimal state must not be weak, which cannot impose the legislative frameworks for the functioning of economic and social reforms, but must be "a strong and efficient rule of law" (Vlăsceanu 2001: 116, 113). This is a commonplace in many global neo-liberal transformations. Loic Wacquant (2011) identified in this type of reasoning the strong right arm of the neo-liberal state that develops precisely when social policies weaken. This is also valid for the transitological expertise that Vlăsceanu elaborates on. The state and its capacity to generate and stabilize institutions must become a force that can consistently materialize the macroeconomic policies proposed by the Washington Consensus:

> "*There is an urgent need to create a strong, stable, competitive, and efficient private sector in which the role of the state consists only in functioning as a catalyst, which permanently fixes the legal, institutional framework of the competition, the communication infrastructure, the macroeconomic stability and especially of the financial system*" (Vlăsceanu 2001:137)

The role of this sociological expertise is the quasi-implacable affirmation of the liberal economy and liberal values as the fundamental project of the country (Vlăsceanu 2001:129), a vision that again bears the mark of Fukuyama's philosophy of uni-linear history (Vlăsceanu 2001:111). This goes hand in hand with the socio-cultural promotion of the cultivation of personal values centred on entrepreneurship and creativity (Vlăsceanu 2001:136) as well as a stronger integration with the organizational culture of companies (Vlăsceanu 2001:134). For Vlăsceanu, the post-socialist 'new modernity' means the necessity of complete adherence to 'liberal democracy and the capitalist market' (Vlăsceanu 2001: 88, 124). It is important to note that the sociological analysis does not bypasses the extensive social dysfunctions of the transition (Vlăsceanu 2001: 14-15). However, it attributes them to the fact that the capitalist economy was not more adequately institutionalized and embedded in Romanian culture and society. The development policies that Vlăsceanu supports are intended to generate the institutional framework for the implementation of solid capitalist mechanisms: "*In the absence of competitive market institutions, privatization is [...] meaningless*" (2001: 127).

A similar statement can be made about the sociology developed by Dumitru Sandu, another prominent figure in post-socialist Romanian sociology. In the volumes 'Sociology of Transition: Values and Social Typologies in Romania' (1996) or 'The Social Space of Transition' (1999), as well as numerous articles, Sandu carries out extremely elaborate statistical analyses and problematizes in a very rigorous manner the social dynamics of the transition from a communist to a capitalist society. In opposition to the institutional analyses of Lazăr Vlăsceanu, the author of these studies is rather interested in the value structures and behaviours that support what he calls the 'cultural complex of reform' (Sandu 1996:77, Sandu 1999: 33,40).

At the beginning of the 1990s, many Western analysts were unsure that Eastern European societies' transition would generate a liberal democracy and a functioning market economy, similar to the Western model (Firebaugh and Sandu 1998:522). In this context, the important question to investigate was related to which social categories could carry out this project and support the fundamental modernization of Romania. If we define social classes not in terms of hierarchies and socio-economic dynamics but according to "beliefs, values and cultural models" (Sandu 1999:97), then the stake becomes the sociological identification of those axiological vectors that can support a so-called 'individual modernity' in opposition to a traditional vision (Sandu 1999:34). Risk-taking, optimism, resilience, openness to new experiences, capitalizing on new opportunity structures become defining elements for a successful transition to a market economy and liberal democracy. From here, identifying entrepreneurs as "*an elite, because of its creativity, resources, and productive performance*" (Sandu 1999:98) as a vector of democratization is only a step away. They are the ones who understand how important it is to be able to take risks in new, unpredictable market conditions. Also, they become analytically the social categories that institutionalize a meritocratic vision of life and express confidence in the individualistic values and in success through personal effort and hard work (Sandu 1999:104). Of course, they also support the importance of privatization (Sandu 1999:106) and vote for those political formations that promised a relaunch of the Romanian economy through de-regulation and insertion into the capitalist market. For Dumitru Sandu, capitalist enterprise is an important factor of social innovation and privatization, and the transition to a market economy is an essential factor for poverty reduction (Sandu 1993). Sociology operates here in a genuine neo-liberal key - in fact, the elimination of poverty, says Dumitru Sandu, "*is not done with passive social protection measures, but, above all, through active measures to promote income-generating activities, by stimulating social, economic and political participation processes. At the centre of these processes must be precisely the private initiative, risk-taking, social creativity*" (Sandu 1999:32).

What is striking again in these studies is their historical uni-linearity. Dumitru Sandu embeds his analyses in a philosophy of history that documents the emancipatory potential of moving from a 'latent' or 'counterfeit' modernity (Sandu 1996:258), understood here in terms of adherence to a set of values existing during the communist period only within restricted social groups, to "an active modernity of capitalism." (Sandu 1999:99 1996:13). All the economic and social turbulence generated by the capitalist reforms taking place in the 1990s are understood as the necessary transition to a new stage in which risk-taking, liberalism, and support for the market economy allow the manifestation of the achievement of genuine modernity in terms of lifestyles and value structures. The adhesion to a radical reformist position, in the sense of a faster transition to a capitalist market economy, is understood as a 'rationalist value orientation' (Sandu 1993:39) and is considered a component of 'universalist' values, which are recurrently opposed to traditional mentalities. Capitalism thus becomes here the exit from the local and provincial and the entrance on a bright and universal future.

The problem with communist societies, according to this expertise, is that this experience shows that they significantly diminished the destabilizing experimentation of risk, specific to capitalist societies, through social protection measures and did not expose populations to a dynamic economy based on resilience, competition between individuals, and meritocracy; the problem of post-communist societies is that they desire Western well-being without assuming the values necessary for such a capitalist economy to function (Firebaugh and Sandu 1998:527). Thinking about the transition in terms of how social typologies, axiological orientations, and life projects are defined (Sandu 1999:115) and not so much in terms of reconfiguration of property relations and class, generates in this type of sociological analysis a genuine support for neo-liberal reforms. The sociological expertise that Sandu provides is ideologically and explicitly pro-capitalist. It is interesting to observe how the sociological research carried out in these books notices the societal discontent with the capitalist transition and opposition to the privatization of large state enterprises (Sandu 1999:42-44, Firebaugh and Sandu 1998:523), but it endorses explicitly the intrinsically good capitalist reforms.

Conclusion: a critical agenda for social-sciences in Romania

Why was it so challenging to develop a critique of capitalist transformations in Romania? A common answer to these questions is that critical elaborations on the type of capitalism developed in post-socialist countries were exogenous and emerged only later on due to the connections of academic networks with Western centres that developed a tradition of criticism (social-democratic or socialist-democratic) against Western capitalism. These analyses highlight global research networks and their role in shaping a local critique of capitalist transformations. Thus, the gap is explained by how these critical theories were 'imported' to Romania.

Contrary to these explanations, it is important to point out that there is a tradition in the post-socialist political economy, relatively forgotten, that aimed at a critique of capitalism that was being reinstated in Romania. This tradition has argued in the 1990s in favour of a mixed economy in which public ownership would continue to play an important role. Their position was anti-Ceaușescu and anti-totalitarian, but it did not align with the Keynesian critique of the neo-liberal reforms that dominated the left then. We can mention here N.N. Constantinescu and the economists who grouped around AGER, an association with several branches in the country. University professor at the ASE in Bucharest, since 1990, a full member and secretary general of the Romanian Academy, founder of the General Association of Economists of Romania, author of dozens of studies on economic history, N.N. Constantinescu was one of the few intellectuals in Romania in the 90s who remained consistent with his leftist principles, in a period when most intellectuals were becoming convinced supporters of capitalism. His critical positions on capitalist reforms spanned a decade in which he carefully followed draft laws, parliamentary debates, and the expertise of international economists who promoted shock therapies in order to achieve a rapid transition to a market economy. From the point of view of Romanian critical theories, there are no clearer positioners in the 90s than N.N. Constantinescu, who connected a theory of primitive accumulation of capital with a careful analysis of the social and economic realities of post-socialist Romania. These studies and articles published in various periodicals of the time constituted the themes of analysis of the books: 'Dilemmas of the Transition to a Market Economy (1992), 'Economic Reform, for Whose Benefit?' (1993), 'Economic reform and recovery' (1995), 'Lessons of the transition in Romania (1997)'.

In 1991, N.N. Constantinescu published 'Primitive Capital Accumulation in Romania'. The study aimed at the history of the formation of capitalism in Romania throughout the 19th and early 20th centuries. This was not a purely historical approach; N. N Constantinescu saw very clearly that the same process of primitive accumulation was being reactivated in the post-socialist period (Constantinescu, 1991:402). What is fascinating, however, in the texts Constantinescu wrote in the 1990s is the critical and clear awareness of the capitalist reforms in full swing. In this context, he shows how the MEBO privatization method will practically lead to disposing of workers from their shares through the legal possibility of accumulating them against rising inflation and deteriorating living conditions (Constantinescu, 1993:93). The process of returning employees' shares from companies also generated a dislocation of democratic control over the way companies functioned and removed them from the influence of workers.

N.N. Constantinescu also had a clear understanding of how these neo-liberal economic reforms would radically alter the class structure of Romanian society (Constantinescu, 1993:64). In an analysis of the governing strategy adopted by the Romanian parliament after the CDR won the elections, he pointed out that the much-invoked ‘middle-class was, in fact, an electoral illusion and that what was happening in Romania at that time amounted to the establishment of a broad process of dispossession of large social categories: “*the predominant class in society will not be the ‘class of small owners’ announced as the ‘middle class,’ but the class of those deprived or almost deprived of property, which constitutes a great social danger*” (Constantinescu, 1997:87). For N.N. Constantinescu, this broad class polarization was well-known from his studies of the history of class dynamics, which he had carried out over many decades. In the early 1990s, he saw social processes unfolding under his eyes, similar to those generated by the crises of the capitalist system in the pre-socialist period. In 1966, he published one of the most substantial analyses of the formation of social classes in Romania in the interwar period, entitled ‘The Situation of the Working Class in Romania 1914-1944’. In terms of the history of the dynamics of class formation in Romania, this volume still constitutes one of the best-documented analyses of capitalist industrial relations in Romania. The book analyses the structural conditions that led to the working classes' pauperization and the capitalist stabilization of the mechanisms of surplus value extraction by concentrating production in the hands of an economic elite. Starting from a documentation of the specific way in which the emergence of the industrialization process took place in Romania and how the agrarian reform of 1923 produced a large surplus of precarious population in the rural area, this study highlighted the polarization of social classes and the precarious situation of industrial and rural workers. Analysing the dynamics of real wages, unemployment rates, and living and housing conditions, N.N. Constantinescu and his collaborators documented the massive dislocations that capital accumulation had generated in Romania. In this vein, his criticism of the post-socialist neo-liberal reforms targeted similar processes - the deterioration of labour relations and the re-iteration of a large class polarization - phenomena that he directly associated with the new capitalist transformations.

At a time when the historical parties of the 1990s promoted a return to the ‘beautiful’ and ‘democratic’ interwar world, N.N. Constantinescu highlighted in his numerous studies and articles the fact that the post-socialist period triggered the emergence of wild capitalism that resumed the same processes of capital accumulation and dispossession of workers from the past: “*Also for reassurance, they (the broad masses of the population) were told that they were being led towards a new society, unknown to them, and under the shelter of these words the advance would be towards a backward, semi-colonial, peripheral and dependent capitalism, in which the majority of the population lives much worse than before and which people knew well from the interwar period*” (Constantinescu, 1997:88)

His analyses of the agricultural reforms are also highly relevant to the critical theories he developed in the first half of the 1990s (Constantinescu, 1997:71). N.N. Constantinescu is sceptical of the general support for the restitution of agricultural properties, showing how the fragmentation of agricultural property takes us to the level of the end of the interwar period in terms of land division and has dramatic consequences for domestic food production, which will generate dependence on exports for agricultural materials (Constantinescu, 1992:82). A third of the people who became owners of agricultural land after 1989 did not live in the countryside and, under the existing conditions, could hardly cultivate that land. Rural households could not effectively be called small farms, as the legislative foundations represented them because they effectively operated in a subsistence regime. In this context, he advocates the formation of associations to pool agricultural land for technologization and professional socialization and real support for agricultural production by the state (Constantinescu, 1992).

Another important field of reflection we see clearly articulated in N.N. Constantinescu’s work in the 1990s is ecology and how economic activities can lead to environmental pollution and the depletion of natural resources. In this context, he advocates for a sustainable economy that leaves the paradigm of an anthropocentric organization of nature (Constantinescu 2000: 507). He argues why environmental costs should be passed on to economic polluters, not society (Constantinescu 2000: 509). He shows how sustainable economic growth must be connected to a non-conflictual way of organizing the social structure and to a state capable of implementing social justice (Constantinescu 2000:509). He also warns about the danger of forest privatization in post-socialist Romania and how an ecological asset was to become an important commodity for the private forestry industry in the context of the emergence of the market economy (Constantinescu 2000: 498).

The critique that the current Romanian political economy is beginning to thematize after three decades of neo-liberal reforms (Georgescu 2018, 2021) is clearly articulated by N.N. Constantinescu already in the early 1990s, but with critical positions against capitalism, not just neo-liberalism. This type of critique was not imported into Romania, but has existed since the 1990s. However, it faded away due to an ideological turn in the social sciences and its agenda to produce knowledge necessary for capital development. In most of the expertise produced within the social sciences in the first two decades, capitalism became a quasi-historical destiny that could guarantee economic and social prosperity. In the context of current growing socio-economic popular dissatisfactions, Romanian sociology must return to a substantial project of interrogating critically the capitalist political economy and the social crises that it cyclically generates (Burawoy 2003, 2005; Burawoy & Wright, 2002).

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STUDIA UBB SOCIOLOGIA, 69 (LXIX), 1, 2024, pp. 39-83
DOI: 10.2478/subbs-2024-0002

DO PERCEPTIONS ABOUT THE CAUSES OF POVERTY AND WEALTH SHAPE ATTITUDES TOWARDS PROGRESSIVE TAXATION? AN EXPLORATORY ANALYSIS FOR 2021 ROMANIA

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ABSTRACT. Lying at the backbone of European welfare states, taxation is both an enabler of redistribution and a predilect means of fiscal welfare. Among Central and Eastern European countries, Romania was an early adopter of flat rate taxation two decades ago, in 2004. As Kovács (2022) convincingly argues, in terms of net wages this shift led to less revolutionary outcomes than expected; however, it clearly diminished the tax burden for middle and higher wages, while those on lower wages paid gradually bigger taxes, as deductions eroded. By 2021, opinion polls indicate that three quarters of Romanians show support for progressive income taxes (Friedrich Ebert Stiftung, 2021: 20). Which socio-economic and demographic factors shape this attitude? The present paper offers an exploratory analysis of the relation between perceptions about the causes of poverty and wealth and being in favour of progressive income taxes in one of the most unequal and impoverished countries of contemporary Europe.

Keywords*:* causal attributions for poverty and wealth; attitudes towards taxation; progressive personal income tax (PIT); Romania

Introduction

Lying at the backbone of European welfare states, taxation is both an enabler of redistribution and a predilect means of fiscal welfare. Among Central and Eastern European countries, Romania was an early adopter of flat rate taxation almost two decades ago, at the end of 2004. As Kovács (2022)

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convincingly argues, in terms of net wages, this shift led to less revolutionary outcomes than expected; however, it clearly diminished the tax burden for middle and higher wages, while those on lower wages paid gradually bigger personal income taxes (PIT), as deductions eroded. By 2021, opinion polls indicate that three quarters of Romanian citizens show support for progressive PIT (FES, 2021: 20). Which socio-economic and demographic factors shape this attitude? The present paper offers an exploratory analysis of the relation between perceptions about the causes of poverty and wealth and being in favour of progressive PIT in one of the most unequal and impoverished countries of contemporary Europe.

Research on the attribution of causes for poverty and wealth has a long tradition in social sciences, often in relation with the analysis of support for social protection and the welfare state. However, less attention has been paid to how and to what extent perceptions about the ways in which people became impoverished or, on the contrary, wealthy, influenced their attitudes towards progressive taxation. This article aims to contribute to the understanding of this three-fold relationship.

In this purpose, we employ the dataset collected within a sociological survey on *Progressive Attitudes and Values in Romania* commissioned by the Friedrich Ebert Stiftung (FES) Romania and carried out by the research institute CCSAS [3] via phone interviews between October and December 2021 on a nationally representative sample of 3,666 respondents (FES, 2021; Bădescu et al., 2022). Besides descriptive statistics and multivariate analysis of statistical associations, we construct binary logistic models to understand the probability of causal attributions for poverty/wealth in terms of individual failure/merit, and, separately, in terms of structural factors and social injustice, using as explanatory variables a set of socio-economic characteristics. Then, we test a similar model to explain the probability of being in favour of progressive taxation and introduce among the potential explanators the perceived causes of poverty/wealth.

The article is organized as follows: first, we offer an overview of existing literature, with focus on previous studies carried out in Romania. Then, we present in detail the methodological design, its innovative aspects, and limitations. The core part of the paper consists of the description and interpretation of our statistical models, followed by a critical discussion of results and conclusions. We provide more details on statistical indicators in the Annex, and additional information is also available upon request.

[3] CCSAS is a research institute based in Cluj-Napoca, Romania, member of the ESOMAR group. See: C|C|S|A|S: Institut de cercetare, cercetări sociale,studii de marketing,focus grup (ccsas.ro)

Literature review

In his seminal study based on the 4th round of the European Social Survey (ESS)[4] of 2008-2009, Domonkos (2016) employed multilevel logistic models to predict attitudes towards progressive taxation in Central and Eastern Europe[5]. He showed that, at the individual level, those who belonged to the older generations, low-ranking routinary service workers, and those with lower incomes were significantly more likely to support progressive PIT across the region. Furthermore, individual attitudes such as trust in the legal system, trust in tax authorities, and sharing the view that income differences constitute a legitimate reward for one's achievements increased significantly the likelihood of preference for flat-rate or lump-sum taxation. Consequently, Domonkos (2016: 440-1) argued that support for redistribution through progressive PIT was not solely driven by self-interest, but also by the worldview that societal institutions were corrupt and greater redistribution was necessary to correct faulty socio-economic structures and mechanisms. At the macro level, despite the reasonable hypothesis that respondents from countries with higher levels of inequality would be more likely in favour of progressive taxation, empirical data had not supported this claim. Instead, domestic economic prosperity, as measured by GDP pe capita, held significant positive influence on preference for progressive taxation (Domonkos, 2016: 437-40). Romania, the country with the second-lowest GDP/capita in the region, marked by large socio-economic inequalities (only partly captured by the Gini coefficient used in the analysis), was also *less* supportive of progressive taxation (with only cc. 45% of respondents in favour) despite its tax system showing very little structural progressivity (Domonkos, 2016: Figure A1, pp. 440-4).

One should note that at the time of the ESS 4 survey only four years have passed since Romania introduced flat-rate taxation in 2005, back then at 16% universal tax rate, and the effects were not yet transparent. As Kovács (2021) demonstrated later, tax deductions for low wage earners diminished soon in real terms, leading to a gradual increase of the tax burden on minimum wages between 2005 and 2017, while taxes on average and high wages kept relatively constant (Kovács, 2021: 65). The share of PIT in the value of the gross domestic product (GDP) increased from cc. 2% in 2005 to cc. 4% in 2015, while the share

[4] For the 4th round of ESS, fieldwork was carried out in the majority of countries between September and December 2008, but in some countries such as Estonia, Hungary, and Poland, interviewing was prolonged for the first months of 2009. See: https://www.europeansocialsurvey.org/ (01.06.2024).

[5] Domonkos (2016) included in his studies the following CEE countries: Bulgaria, Croatia, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Russia, Slovakia, Slovenia, and Ukraine. The total pooled sample consisted of 24,137 respondents.

of taxes on commercial company profits fluctuated at around 2% (Ban and Rusu, 2019: 15). The (little) progressivity of the system shrank even more after 2018, with the introduction of the 10% flat rate and the transfer of social insurance contributions from employers to employees, resulting in a regressive fiscal regime (Ban, 2023: 10-12). Tax exemptions for the IT sector remained in place between 2001 and 2024 as an attempt to safeguard the international competitivity of this industry. Given the current fiscal crisis faced by the country, Ban (2023) advocates for the introduction of moderately progressive PIT. As we further discuss, by 2012 support for progressive taxation increased at cc. 64% of the population and three years later at cc. 74% (Gheorghiță, 2023: 5; 8). Then, it remained high at cc. 73% in 2021 (Bădescu, 2022: 29).

Using data from the 2012 post-electoral survey in Romania, Gheorghiță (2023) asked the reverse question: what explains support for flat-rate taxation? Six hypotheses were outlined: persons with higher incomes, those with higher educational levels, and those of right-wing political orientation should be *more* likely to be in favour of flat rate PIT, while older persons, those showing higher levels of social solidarity, and those who distrust public institutions should be *less* likely to support it (Gheorghiță, 2023: 6). Logistic regression models were employed to test these hypotheses, with income measured as personal income in national currency for the previous month, education measured in years of schooling, and specific indexes constructed for ideology, political trust, social solidarity, and political knowledge (Gheorghiță, 2023: 6-7). The results indicate that higher income earners, women, and those who declared greater trust in political institutions were more likely to be in favour of flat rate tax, while individuals who completed more years of education, and those who scored higher on the social solidarity index were less likely to be in favour (Gheorghiță, 2023: 10). These findings partly converge with the conclusions of Domonkos' earlier study (2016) in that they both reveal the same direction of influence for income and political trust, yet the effects of education, age, and gender as potential explanatory factors diverge. This could be somewhat explained by methodological aspects, as education and age were measured in years as continuous variables by Gheorghiță (2023), while Domonkos (2016) used them as categorical variables: educational level and generation (age category). The different timing of fieldwork could be another explainer: 2008, i.e. before the global financial crisis in the case of Domonkos (2016), and 2012, still under the shadow of the financial crisis, in the case of Gheorghiță (2023).

Survey data gathered almost ten years later, in December 2021, allows us to update and nuance these pictures. As mentioned in the *Introduction*, the sociological survey on *Progressive Attitudes and Values in Romania* commissioned by Friedrich Ebert Stiftung (FES) Romania and carried out by the research institute CCSAS (FES, 2021) contained a dedicated section on attitudes towards taxation. In his exploratory analysis, Bădescu (2022) showed that 73% of respondents supported progressive taxation, and only 23% opted for the flat-rate model (Bădescu, 2022: 29). Respondents were also in favour of exempting minimum wage earners from paying income taxes (72%), while placing higher taxes on those who pollute (73%), on companies (55%), and on those with more housing properties (54%) (Bădescu, 2022: 29). Concerning potential determinants of attitudes towards progressive taxation, Bădescu showed that those facing economic hardship, older persons, and those with lower levels of education were relatively more likely to support progressive taxation. Political orientation to the left was also associated with preference for progressive taxation, but only moderately (Bădescu, 2022: 29-32).

From a longitudinal perspective, these studies complete the enduring portrayal of the Romanian population as largely supportive of state intervention in the field of social welfare. In one of the first complex studies of the relations between values, support for social policies, and attitudes towards taxes in post-socialist Romania, Mălina Voicu (2005: 58) presented empirical data for the late 1990s that reveal mainstream support for state social and economic policies (price control, unemployment, housing, reducing inequalities). Willingness to pay *higher* taxes was more frequent when tax revenues were to be directed towards financing child allowances, housing, health care, education, and military defence of the country (but not the police). Respondents in favour of increasing public spending, as well as those with higher educational levels were more likely to support higher taxes, possibly because they acknowledged the usefulness of public services (Voicu, 2005: 78-85). The issue of progressive *versus* flat-rate taxation, at the time still only emergent in Romania, remained outside of the scope of Voicu’s study. More than fifteen years later, the FES 2021 survey revealed that an overwhelming majority of the population considered that the state should control prices (86%), generate more jobs (93%), ensure universal access to health care services (92%), and support various social policies, including housing (FES, 2021: 15-16, Gog, 2022: 10; Trifan, 2024: 283-286).

Thus, the political preference of Romanian citizens inclines towards an institutional-redistributive, social-democratic welfare state (Esping-Andersen, 1990) in line with what was envisaged as a “European Social Model” and reaffirmed through the 2017 European Pillar of Social Rights[6]. While these fall closer to the political left, self-reported left-wing political orientation has only moderately and ambiguously increased from cc. 14% in 1992 to cc. 18% in

[6] About the European Pillar of Social Rights, see: https://ec.europa.eu/social/main.jsp?catId=1226&langId=en (01.06.2024).

2018, while right-wing orientation fluctuated at around cc. 20-23% (Comșa, 2020: 123, Figure 40). Moreover, a share of almost 40% of respondents did not position themselves on the left-right political scale throughout the 1990s and the first decade of 2000, and their share decreased only after 2012 at cc. 35% (Comșa, 2020: 122, Figure 39). Using data from the 2018 World Values Surveys, Comșa convincingly argues that self-declared political orientation did not straightforwardly reflect persons' positions on conventional left-right indicators (income inequality, public *versus* private ownership, state *versus* individual responsibility for welfare, and the benefits of competition). He estimated that only one quarter of respondents positioned themselves on the left-right political scale consistently with their priorly described policy preferences (Comșa, 2020: 128). In a later study based on the FES 2021 dataset, Mihai (2024) draws attention to the fact in Romania, as compared to Western Europe, women were more likely to be on the right or undecided on how to position themselves on the political spectrum. Together with their preference for a more interventionist state and stronger religious affiliation, this may lead towards the growth of a conservative electorate among Romanian women, even for the younger generations, in the absence of emancipatory left-wing feminist movements (Mihai, 2024: 207-8).

Causal attributions for poverty and wealth are largely acknowledged as predictors of social policy preferences and attitudes towards the welfare state (Kallio and Niemela, 2014). However, their roles in shaping attitudes towards progressive taxation received less attention. Conventionally, following Joe R. Feagin's groundbreaking work from the early 1970s, research on causal attributions for poverty differentiates between individualistic factors (behaviour, attitudes, personal characteristics etc.), *structural factors* (social inequality, lack of opportunities, inadequate redistribution, social injustice etc.) and *fatalistic views* (destiny, bad luck etc.) (see Feagin, 1972 *apud.* Kallio and Niemela, 2014: 114; and *apud.* Grobler and Dunga, 2016: 129). Feagin (2001) integrated his study on perceived causes of poverty into a broader research agenda on social justice, institutional discrimination and oppression, and the critique of global capitalism, outlined in his *Presidential Address* at the American Sociological Association in 2000. Taking inspiration from his early study, forthcoming researchers applied and further adjusted his scale to measure causal attributions for poverty (Grobler and Dunga, 2016: 133-134), and later poverty and wealth (see Sainz et al., 2023 for a recent *state of the art* review and application of scales for Mexico).

Cross-country comparisons on perceived determinants of poverty in European countries concluded that persons belonging to the working class, those facing economic strain, and older generations (da Costa and Dias, 2014) were more likely to assign structural causes to poverty; similarly, subjective experience of poverty and value-orientation towards equality (Lepianka et al., 2010) increased the likelihood of structural attributions. Multilevel modelling also revealed country-level affects, given by the local socio-economic and cultural context. Lepianka et al. (2010) show that higher average work ethic in the country was significantly associated with more frequent individualistic attributions that blame the alleged laziness and lack of willpower of the poor, while higher egalitarianism increased the probability of structural explanations of poverty. Higher share of Catholics also increased the likelihood of attributing poverty to social injustice, but also of fatalistic attributions, as opposed to seeing poverty as an inevitable part of modern progress (Lepianka et al., 2010: 67). Da Costa and Dias (2014) cluster European countries based on their Human Development Index (HDI, as computed by the United Nations Development Programme) and at-risk-of poverty rates (as measured by Eurostat), and demonstrate that the cluster of countries with the worst levels of HDI and poverty, that includes Romania, Greece, Cyprus, Bulgaria, and (surprisingly) Croatia, also shared the most widespread causal attribution for poverty to *structural* factors, respondents from these countries being more likely to see the impoverished as „victims of the society" or „victims of low social benefits" (Da Costa and Dias, 2014: 14-5). On the contrary, respondents from the cluster of most developed countries, with low poverty rates, that included Sweden, Denmark, and the Netherlands, were more likely than respondents from other countries to attribute *individualistic* causes such as addiction or *fatalistic* causes (bad luck).

Based on the existing literature, we expected high rates of poverty and income inequality would generate more widespread structural interpretations of poverty in Romania. While severe material deprivation declined from 38% in 2007 to 32.7% in 2008, and gradually down at 15.2% by 2020, relative monetary poverty or the *at-risk-of-poverty rate* as measured by Eurostat remained high at around 25% during the first decade of EU membership (INS - Tempo, 2024). The poverty reduction effects of welfare transfers decreased from around 22% in 2007 to merely 16% in 2017, much below the EU average (Raț et al., 2019: 451). By 2022, the new indicators of material and social deprivation point at a rate of 23.4% in Romania, as compared to only 6.7% in the EU (Eurostat, 2024). The rate of relative monetary poverty (at-risk-of-poverty rate) decreased slightly at 21.2% in 2022, still significantly above the 16.5% EU average (Eurostat, 2024). Importantly, income inequality decreased only modestly: the Gini coefficient from 38% in 2007 to around 35% in the years of the financial crisis and then 32% in 2022, while the quintile ratios indicate that the highest earning population quintile gains, on average, 6-7 times higher incomes as compared to the lowest paid quintile (Eurostat, 2024). Regional inequalities and polarization of metropolitan areas also expanded, despite EU integration (Fina et al., 2020; Pop, 2023).

In their country-study on discriminatory attitudes in Romania, Chilin and Lup (2016) compared the results of the 1999 and 2008 European Values Surveys (EVS), the 2002 Candidate Countries Eurobarometer, and the 2006 Roma Integration Barometer and showed that the percentage of those who attributed poverty to „laziness and lack of willpower" decreased from 29% in 1999 to around 20% in 2002 and 2006, but then it soared back at 38% in 2008. Conversely, the percentage of those pointing at social injustice fluctuated at around 42% between 1999 and 2006, and then decreased at 32% in 2008. The remaining respondents saw poverty as driven by bad luck or as an inevitable part of modern progress. Bivariate statistics for the two EVS, 1999 and 2008, revealed that younger respondents, and those with higher educational degrees were less likely to attribute poverty to individual's fault (Chilin and Lup, 2016: 23-4). This might be partly explained by the persistently high youth unemployment rate throughout the 1990s and 2000s, at cc. 16% for the 20-24 age group (INS - Tempo, 2024). The decline in the percentage of those attributing poverty to social injustice from 42% in 1999 to only 32% in 2008, shown by the above-mentioned EVS data, could be tentatively linked to the increasing opportunities of working abroad, following the 2007 EU integration, and in this way improving one's living standards and sending important remittances home (Sandu, 2013).

Unlike the EVS surveys, special Eurobarometers on social climate [7] indicated that in 2007 the percentage of Romanians who attributed poverty to social injustice was as high as 52.8%, and by 2010 it increased at 65.4%, well above the EU average of 52.1% (Keller, 2011: 22). As we further discuss, the 2021 FES study showed that 61.8% of respondents attributed poverty to social injustice, and less than 30% blamed the impoverished (valid percents after recoding "other causes" and excluding DK/NA). Differences in survey results might stem from methodological issues, such as sampling and sample size, general topic of the questionnaire, framing of other questions on poverty and inequality, recoding of answers, and treatment of inconclusive responses and refusals. However, a pattern of predominantly structural interpretations of poverty can be clearly depicted during and after the global financial crisis that reached Romania between 2009 and 2012.

In a rare comparative study on the perception of the causes of poverty among beneficiaries of the Guaranteed Minimum Income (GMI) welfare program and the general population of Romania, Cojanu and Stroe (2017) show that

[7] Keller (2011: 22) indicated the use of the following datasets: Special Eurobarometer Survey, Reference Number: 279, wave: EB.67.1 (2007); Special Eurobarometer Survey, Reference Number: 321, wave: EB.72.1 (2009); Special Eurobarometer Survey, Reference Number: 355, wave: EB.74.1 (2010), pooled dataset.

structural explanations of poverty and a sense of social injustice prevail in both cases. Based on a survey of 600 social assistance beneficiaries within the GMI scheme, undertaken in October 2016, they assert that beneficiaries predominantly attribute poverty to the lack of available jobs, low wages, care needs of children and other dependents, disability or poor health, lack of support from the family. In comparison, the Romanian general population, as surveyed by the special Eurobarometer 2010, considered that poverty was mainly driven by low wages, meagre social benefits, unemployment. Furthermore, 40% of respondents asserted that being born in a poor family led to deprivation over the life course (Cojanu and Stroe, 2017: 193).

Using the same dataset on *Progressive Attitudes and Values in Romania* (FES, 2021) as our study, Trifan (2024) interpreted causal attributions for poverty in the light of the neoliberal "personal development" discourse that by 2020 became mainstream in Romania too, and it overshadowed the structural, socio-political explanations of poverty and long-term unemployment that prevailed in the first years of post-socialist transformations. Trifan (2024: 278) convincingly argued that the significantly higher proportion of individualistic attributions for poverty among employers and self-employed/ freelancers, and among those with higher educational credentials, could be largely explained by the fact that these categories were the main recipients of the neoliberal doctrine on self-achievement, who were also able to pay for specific personal development services or received such training at their corporate jobs. Furthermore, Trifan highlighted the significant association between respondents' subjective economic situation and their views on the causes of poverty: those who barely make ends meet attribute poverty disproportionately more frequently to „being born in a poor family", while those with a comfortable economic situation blame the impoverished for not working hard enough (Trifan, 2024: 280). However, her analysis remained at the level of bivariate associations, and she described expectations for more state intervention in the economic and social fields that were shared by an overwhelming majority of respondents. The gender dimension of these expectations was analysed by Mihai (2024), who shows that women were more likely to require more state action for security (policing) and social protection, while men - to expect the government to cut public spending (Mihai, 2022: 203-4).

Perceptions of the causes of wealth received less scholarly attention in Romania, possibly because the issue of large income inequalities and the question of legitimate redistribution overshadowed them. Based on survey carried out by the National Scientific Research Institute for Labour and Social Protection by the end of 2019 on a representative sample for the Romanian population, Cristescu et al. (2020: 209) reported that 64.4% of respondents agreed that "the state should tax the rich more in order to offer support for the poor", while 23% were undecided about this statement and only 12.6% opposed. The introduction of progressive taxation was seen as a means of reducing income inequalities by 50.2% of respondents (Cristescu et al., 2020: 210).

To summarize, our research taps into a series of studies on potential explanators of attitudes towards progressive taxation and perceived causes of poverty in Romania. We aim at contributing to this ongoing endeavour by exploring the relationship between these two factors, and by bringing in a third potentially interlinked variable, namely perceived causes of wealth.

Methods and data description

We employed microdata collected by the research institute CCSAS[8] via phone survey between October and December 2021 within a project on political attitudes in Romania supported by the Friedrich Ebert Stiftung (FES) Romania. The dataset is available upon request curtesy to FES, along with an interim research report issued by CCSAS in December 2021 that presents the methodological details on sampling, weighting cases, and computer assisted telephone interviewing (CATI) used in the survey (FES, 2021). An early analysis was offered by Bădescu et. al (2022) in the report *Atitudini și valori de tip progresist in Romania (Progressive attitudes and values in Romania)* which can be retrieved from the open-access FES Library[9].

The survey involved three different stratified-random samples, each receiving a set of fix questions (the same for all three samples) and a set of specific questions, applicable only for one of the three samples. The cumulative final sample consisted of 3,666 respondents (1,774 men and 1,892 women), aged between 18 and 95.

We analysed the data with the help of IBM SPSS version 22. Given that our analysis required a large number of cases, suitable for multivariate explanatory statistics, we only used the variables included in all three samples:

- *Age* – self-reported biological age
- *Gender* – recoded into dummy variable, 1=male, 0=female
- *Ethnicity* – 1=Romanian, 2=Hungarian, 3=Roma, 4=German (only one case) and 5=Other

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8 CCSAS is a research institute based in Cluj-Napoca, Romania, member of the ESOMAR group. See: C|C|S|A|S: Institut de cercetare, cercetări sociale,studii de marketing,focus grup (ccsas.ro)

9 Bădescu, G., Gog, S. and Tufiş, C. (2022). Atitudini şi valori de tip progresist în Romania [Progressive Attitudes and Values in Romania]. Bucureşti: FES. library.fes.de/pdf-files/bueros/bukarest/19247.pdf (02.08.2024).

- *Religion* – given that 83.4% of respondents declared themselves Orthodox Christians, this variable could not be used as a potential explanatory factor. Instead, we used *Religiosity,* indicated by the frequency of church attendance. The initial variable was recoded into a dummy with 1=attending the church weekly or monthly and 0=attending the church less than monthly, only occasionally or never
- *Area of residence* – 1=urban, 0=rural
- *Education* – self-reported on the ISCED scale, recoded into three categories: 1=vocational education, gymnasium or less (no more than 10 years of schooling); 2=high school, college or technical postsecondary education; 3=university degree
- *Mother's education* - reported by the respondent on the ISCED scale, recoded into three categories: 1=vocational education, gymnasium or less (no more than 10 years of schooling); 2=high school, college or technical postsecondary education; 3=university degree. This variable was used to measure *respondents' social mobility patterns* on the educational dimension. Based on the difference between the recoded versions of respondents' education and their mothers' education, a new variable was computed with three categories: upwards educational mobility, reproduction of mother's education, and downwards educational mobility.
- *Occupational status* – the initial variable reported 28 agricultural workers, 30 unemployed, and 88 persons with "other" occupational status. Given their small number, agricultural workers were merged into the category of wage earners. In the absence of more information about their professions, unemployed and "other" were filtered out from the dataset (recoded as missing values). The remaining occupational categories: 1=employee (including agricultural workers), 2=self-employed/freelancer, 3=employer/entrepreneur, 3=student, 4=homemaker („casnic/ă"), 5=retired person. The variable was recoded into dummies, with *employees* as a reference category. *Self-employed/freelancers* and *employers/ entrepreneurs* were merge into one category.
- *Subjective economic well-being* – the initial variable was measured on the five steps scale: *the income of our household is* 1=not enough for the bare necessities; 2=only enough for the bare necessities; 3=enough for a decent living; 4=enough for a comfortable/ satisfactory living. The last two categories were merge into one, and dummy variables were created, with *only enough for the bare necessities* as a reference category.
- *In your opinion, why are they poor people in Romania?* – the initial variable had six categories: 1=they do not work enough; 2=they are unlucky; 3=they lack relations; 4=they come from poor families; 5=other causes.

There were 345 responses of *other causes,* and these were recoded along with the initial categories in order to have only three distinct categories: 1=not working enough/lacking an adequate attitude (*individual's fault*); 2=destiny/ being unlucky; 3=coming from an impoverished family/ lack of educational opportunities/ low wages (*structural causes, social injustice*). For the analysis, dummies were constructed for *individual's fault* (yes=1, no=0) and *structural causes/ social injustice* (yes=1, no=0). Don't know/ no response were considered missing cases.

- *In your opinion, how did people get wealthy in Romania?* – the initial variable had four categories: 1=work; 2=good luck; 3=relations; 4=trespassing the law; 5=by other means. There were 81 responses of *by other means,* and these were recoded along with the initial categories in order to have only three distinct categories: 1=work/skills/assuming risks (*individual's merit*); 2=good luck/destiny; 3=trespassing the law/ corruption/relations (*by unfair means/ structural causes, social injustice*). We considered that *trespassing the law* as the *prevalent* means for getting rich should be considered a *structural* and not an *individualistic* explanation given that it indicates a failure of societal institutions to implement the laws and to ensure a just allocation of resources. For the analysis, dummies were constructed for *individual's merit* (yes=1, no=0) and *structural causes/ social injustice* (yes=1, no=0). Don't know/ no response were considered missing cases.
- *Political orientation* – the initial variable was measured on a scale from 1 (left) to 10 (right). It was recoded in the following way: 1 through 3 = „left", 4 through 7 = „centre", 8 through 10 = „right". Dummies were constructed from left and right-wing orientations, with centrist orientation as a reference category. This variable registered a much larger share of non-responses or "I don't know" responses.
- *Attitude towards progressive income tax* - respondents ought to choose between 1= everybody should pay the same percentage of their income as tax, no matter how much they earn; 2=those with higher earnings should pay a larger percentage of their income tax. A dummy variable was created with preference for flat-rate tax as a reference category (1= in favour of progressive income tax, 0=not in favour).

Table 1. provides a description of the sample for the variables included in the analysis. A few variables were used in their initial form (as in the original dataset), while the majority recoded to better fit logistic modelling, as indicate in the first column of the table.

Table 1. Sample description for the variables included in the analysis

Variable	Categories	Number of respondents	Percentage
Gender	Women	1892	51.6%
	Men	1774	48.4%
Age	Continuous variable	3666	Mean = 49.4 Std.=17.8
Generation (recoded)	1920-1965 (older)	1402	38.2%
	1966-1989 (reference gen.)	1578	43.0%
	1990-2003 (younger)	687	18.7%
Ethnicity	Romanian	3263	89.0%
	Hungarian	220	6.0%
	Roma	123	3.4%
	Other	60	1.6%
Ethnic minority (recoded)	Romanian	3263	89.0%
	Ethnic minority	403	11.0%
Area of residence	Rural	1676	45.7%
	Urban	1990	54.3%
Occupational status	Employee	1512	41.2%
	Self-employed	174	4.7%
	Employer/ Entrepreneur	81	2.2%
	Agricultural worker	28	.8%
	Student	170	4.6%
	Homemaker	315	8.6%
	Unemployed	30	.8%
	Retired	1266	34.5%

Variable	Categories	Number of respondents	Percentage
	Other	88	2.4%
	Don't know/ No answer	2	0.1%
Household's economic situation	Not enough for the bare necessities	384	10.5%
	Only enough for the bare necessities	1362	37.2%
	Enough for a decent living	1617	44.1%
	Enough for a comfortable, satisfactory living	266	7.3%
	Don't know/ No answer	37	1%
Economic strain (recoded)	Economic strain (barely making ends meet)	1746	47.7%
	No economic strain (decent/comfortable living)	1883	51.4%
	Don't know/ No answer	37	1%
Education (recoded)	Gymnasium/ vocational school or less	1984	54.1%
	High school/ secondary education	1098	29.9%
	University degree	584	15.9%
Educational mobility (recoded)	Upwards mobility	994	27.1%
	Reproduction	2101	57.3%
	Downwards mobility	243	6.6%
	Missing cases	327	8.9%
Religion (recoded)	Orthodox	3056	83.4%
	Other	449	12.1%
	No religious affiliation	110	3.1%
	Don't know/ No answer	51	1.4%

Variable	Categories	Number of respondents	Percentage
Religiosity (recoded)	Frequent church attendance	2300	62.7%
	Seldom or never	1310	35.7%
	Don’t know/ No answer	56	1.5%
Political orientation (recoded)	Left	569	15.5%
	Centre	1061	29.0%
	Right	917	25.0%
	Don’t know/ No answer	1119	30.5%
Perceived causes of poverty (recoded)	Individual’s fault	1089	29.7%
	Bad luck/ Destiny	226	6.2%
	Structural causes, social injustice	2128	58.0%
	Don’t know/ No answer	223	6%
Perceived causes of wealth (recoded)	Individual’s merit	556	15.2%
	Good luck/ Destiny	159	4.3%
	Structural causes, social injustice	2683	73.2%
	Don’t know/ No answer	268	7.3%
Attitude towards progressive taxation (recoded)	In favour	2701	73.7%
	Not in favour	824	22.5%
	Don’t know/ No answer	142	3.9%

Note: Categories of *Don’t know/ No answer (DN/NA)* were treated as missing values and excluded from the analysis.
Source: Authors’ calculations.

Statistical analysis of potential determinants of causal attributions to poverty and wealth, and how they affect attitudes towards progressive income tax

We started the analysis with testing the statistical significance of bivariate associations between the three main dependent variables (causal attributions for poverty, causal attributions for wealth, attitude towards progressive income tax) and the set of potential explanatory (independent) variables. **Table 2.** presents these associations, while their corresponding bivariate distributions are presented in the *Annex.*

Table 2. Associations between perceptions of the causes of wealth, poverty, attitude towards progressive taxation and socio-economic variables

	Perceptions of the causes of wealth	Perceptions of the causes of poverty	Attitude towards progressive taxation
Gender	0.039** (N=3.398)	0.059** (N=3.444)	0.035* (N=3.525)
Generation	0.054** (N=3.398)	0.034 (N=3.443)	0.214** (N=3.525)
Ethnicity	0.043 (N=3.398)	0.048* (N=3.444)	0.019 (N=3.525)
Religiosity	0.004 (N=3.356)	0.029 (N=3.394)	0.076** (N=3.471)
Area of residence	0.037 (N=3.398)	0.026 (N=3.444)	0.113** (N=3.524)
Education	0.045** (N=3.398)	0.066* (N=3.444)	0.170** (N=3.523)
Educational mobility	0.019 (N=3.109)	0.065 (N=3.148)	0.070** (N=3.227)
Occupational status	0.070** (N=3.269)	0.084** (N=3.303)	0.199** (N=3.384)
Economic strain	0.113** (N=3.368)	0.102** (N=3.413)	0.102** (N=3.496)
Political orientation	0.066** (N=2.406)	0.047* (N=2.430)	0.069** (N=2.471)

Note: Figures indicate the values of Cramer's V, with N=number of cases. Statistically significant associations **p<0.01, *p<0.05
Source: Authors' calculations.

Then, we explored potential interdependences between our independent variables. As shown in **Table 3.,** the association between perceived causes of poverty and those of wealth was statistically significant, but moderate (Cramer's V=0.119, Sig.=0.000). Importantly, 51.5% of all respondents attributed structural, societal causes to *both* poverty and wealth. Conversely, only 7.7% of respondents attributed individualistic explanations to both. However, there were also apparent inconsistencies as 22.6% of respondents attributed structural causes to poverty, but perceived wealth as an outcome of individual's merit.

Table 3. Association between perceived causes of poverty and wealth

		Perceived causes of wealth			Total
		Individual's merit	Good luck/ destiny	Social injustice	
Perceived causes of poverty	Individual's fault	252	24	252	528
		7.7%	0.7%	7.7%	16.2%
	Bad luck/ Destiny	45	22	84	151
		1.4%	0.7%	2.6%	4.6%
	Social injustice	736	162	1675	2573
		22.6%	5.0%	51.5%	79.1%
Total		1033	208	2011	3252
		31.8%	6.4%	61.8%	100.0%
Cramer's V=0.119**, Sig.=0.000					

Note: **p<0.01
Source: Authors' calculations.

Causal attributions for poverty were only modestly associated with attitudes towards progressive taxation (Cramer's V=0.053, Sig.=0.000): irrespective of the perceived causes of poverty, more than 70% of respondents favoured progressive taxation. The difference between those who attributed poverty to individual's fault (75% in favour of progressive taxation) and those who indicated structural factors (78.8%) was less than 4% (see **Table 4**).

Table 4. Association between perceived causes of poverty and attitude towards progressive taxation

		Perceived causes of poverty			Total
		Individual's merit	Bad luck/ destiny	Social injustice	
Attitude towards progressive taxation	Not in favour	262	62	436	760
		25.0%	28.3%	21.2%	22.9%
	In favour	788	157	1618	2563
		75.0%	71.7%	78.8%	77.1%
Total		1050	219	2054	3323
		100%	100%	100%	100%
Cramer's V=0.053**, Sig.=0.005					

Note: **p<0.01
Source: Authors' calculations.

In turn, causal attributions for wealth showed comparatively higher association with attitudes towards progressive taxation (Cramer's V=0.128, Sig.=0.000) and the difference between those who perceived wealth as driven by individual merit (65.3% in favour of progressive taxation) and those who attributed it to social injustice (79.7%) reached an estimated 14.4% (see **Table 5**).

Table 5. Association between perceived causes of wealth and attitude towards progressive taxation

		Perceived causes of wealth			Total
		Individual's merit	Bad luck/ destiny	Social injustice	
Attitude towards progressive taxation	Not in favour	183	43	529	755
		34.7%	28.7%	20.3%	23.0%
	In favour	345	107	2074	2526
		65.3%	71.3%	79.7%	77.0%
Total		528	150	2603	3281
		100%	100%	100%	100%
Cramer's V=0.128**, Sig.=0.000					

Note: **p<0.01
Source: Authors' calculations.

To explain the probability of assigning individualistic causes for poverty and, conversely, structural causes, we employed binary logistic regression models. The following predictors were used: gender (male=1), age recoded in three generations (dummies for the younger generation born between 1990-2003, the older generation born before 1966, and the 1966-1989 generation as a reference category), area of residence in urban versus rural areas (urban=1), ethnic minority status (ethnic minority=1), education (dummies for gymnasium/ vocational education or less and for university degree, and high school/ secondary education as a reference category), upwards educational mobility (respondent's educational level higher than mother's), occupational status (self-employed or employers, students, homemakers, pensioners, and employees as a reference category), religiosity (frequent church attendance=1), economic strain (household income only enough for bare necessities or less=1), political orientation (left, right, and centre as a reference category). Given that 30% of respondents did not position themselves on the political orientation scale, and consequently they were filtered out as missing cases from multivariate analyses, we also tested the model without including political orientation. The goodness of fits of the models, values of odds ratios (Exp(B)) for each variable and their statistical significances are reported in **Tables 6.1 and 6.2**; in both tables, Model 1 is without political orientation variables, while Model 2 includes them. Separately, we also tested the model by replacing the dummies for generations with age as a continuous variable. Neither the goodness of fit of the models, nor the effects of explanatory variables changed significantly.

Overall, the goodness of fit of models, as indicated by the Nagelkerke Pseudo R Squares, was rather weak for both predicting the probability of assigning individualistic causes for poverty and the probability of assigning structural causes. All four models tested explained only around 4%-4.5% of the probability to assign individualistic or, conversely, structural causes for poverty. However, the models mostly converged to identify the main explanatory variables as older generation, occupational status of employer/self-employed, economic strain, and left-wing political orientation, albeit the effects of gender and homemaker status varied. Based on their explanatory power, we opted for the models that included political orientation among predictors (Model 2). All other conditions accounted for in the models being equal, self-employed/ employers were approximately 1.8 times more likely than employees (wage earners) to assign individualistic causes for poverty (Exp.(B)=1.808, Sig.=0.001). Conversely, they were 0.7 times less likely to assign structural causes (Exp.(B)=0.682, Sig.=0.003). Next, economic strain increased the likelihood of assigning structural causes to poverty. Respondents who asserted that their households' incomes barely allow to make ends meet were 1.5 times more likely to assert that poverty was driven by social injustice as compared to respondents who reported a comfortable household income

(Exp.(B)=1.492, Sig.=0.000). Conversely, they were approximately 0.7 times less likely to consider poverty individual's fault (Exp.(B)=0.681, Sig.=0.000). A comparable effect was held by left-wing political orientation: those who identified with the left were 1.5 times more likely to see structural factors causing poverty as compared to those with a centre orientation (Exp.(B)=1.505, Sig.=0.001). The former were also 0.7 times less likely than the latter to blame individual's fault (Exp.(B)=0.702, Sig.=0.006). Interestingly, right-wing orientation did not have statistically significant effects. Older generations were more approximately 1.4 times more likely to assert individualistic explanations for poverty as compared to the mid-aged generation of 1966-89 (Exp.(B)=1.391, Sig.=0.045). Conversely, they were 0.7 times less likely to see poverty as driven by structural factors (Exp.(B)=0.696, Sig.=0.023). Gender and homemaker occupational status held significant effects only in the model for the probability of perceiving individual causes for poverty, with men (Exp.(B)=0.792, Sig.=0.017) and homemakers (Exp.(B)=0.642, Sig.=0.038) less likely to assert that poverty is driven by individual's misbehaviour (Table 6.1, Model 1). Further investigations on larger samples would be necessary to interpret these latter findings, having in view that 82% of homemakers were women, and there was a statistically significant association between gender and homemaker occupational status (Phi=-0.189, Sig.=0.000). Their effects disappeared when predicting structural attributions for poverty. Instead, at first low educational level seemed to increase the likelihood of embracing structural explanations for poverty, but its effect faded away once political orientation was introduced in the model (Table 6.2, Model 2).

To summarize: only around 4.5% of the variance of assigning individualistic or structural causes to poverty can be explained by the set of variables included in our binary logistic models. In accordance with previous studies (Lepianka et al., 2010; da Costa and Dias, 2014), our results indicate that structural explanations of poverty were less likely for the older generations, and more likely in the case of those who experienced economic strain. The effects of gender and education were inconclusive, while residence in urban/ rural localities, ethnic minority status, and religiosity had no significant effects. In contrast with Chilin and Lup (2016: 23-4), we saw no evidence of younger respondents and those with higher educational credentials being *less* likely to attribute poverty to individual's fault. However, we could depict statistically significant and robust effects for occupational status, as self-employed and employers were more likely than wage earners to perceive poverty as individual's fault, and less likely to assign it to social injustice. This was in line with earlier findings that working class respondents were more likely to assert structural explanations of poverty (Lepianka, 2010; da Costa and Dias, 2014). Left-wing political orientation increased the likelihood of seeing poverty as driven by social injustice.

Table 6.1. Binary logistic regression for attributing poverty to individual's fault

	Model 1		Model 2	
Explanatory variables	Exp(B)	Sig.	Exp(B)	Sig.
Gender	.852	.056	.792*	.017
Younger generation	1.040	.753	.933	.626
Older generation	1.490**	.004	1.391*	.045
Urban	.985	.861	1.015	.879
Ethnic minority	1.054	.688	1.035	.836
Education*: Gymnasium/ vocational education or less	.783	.054	.930	.624
Education: University degree	1.060	.644	1.128	.404
Upwards educational mobility	.980	.873	1.104	.501
Occupation**: Employer/ self-employed	2.123**	.000	1.808**	.001
Occupation: Student	1.048	.827	.979	.929
Occupation: Homemaker	.631**	.009	.642*	.038
Occupation: Pensioner	.917	.553	.965	.837
Religiosity	.902	.222	.908	.336
Economic strain	.725**	.000	.681**	.000
Political orientation***: left	----	----	.702**	.006
Political orientation: right	----	----	1.109	.327
Constant	.592	.000	.603	.005
Model summary				
Nagelkerke R Square	0.039		0.044	
Number of valid cases (without missing values)	3085		2257	

Notes:
*Education – reference category = high school or secondary education
**Occupation – reference category = employee (wage earner)
***Political orientation – reference category = centre (DK/NR filtered out as missing)
Statistically significant associations **p<0.01, *p<0.05
Source: Authors' calculations.

Table 6.2. Binary logistic regression for attributing poverty to social injustice

	Model 1		Model 2	
Explanatory variables	Exp(B)	Sig.	Exp(B)	Sig.
Gender	1.027	.744	1.079	.420
Younger generation	1.083	.508	1.186	.213
Older generation	.633**	.001	.696*	.023
Urban	1.012	.881	.999	.992
Ethnic minority	1.039	.765	1.151	.385
Education*: Gymnasium/ vocational education or less	1.349*	.015	1.145	.344
Education: University degree	.968	.792	.908	.495
Upwards educational mobility	1.016	.898	.945	.691
Occupation**: Employer/ self-employed	.533	.000	.582**	.003
Occupation: Student	.904	.626	.898	.640
Occupation: Homemaker	1.330	.080	1.202	.348
Occupation: Pensioner	1.100	.497	1.026	.879
Religiosity	1.138	.111	1.136	.189
Economic strain	1.399	.000	1.492**	.000
Political orientation***: left	---	---	1.505**	.001
Political orientation: right	---	---	.950	.615
Constant	1.296	.067	1.254	.190
Model summary				
Nagelkerke R Square	0.038		0.042	
Number of valid cases (without missing values)	3085		2244	

Notes: *Education – reference category = high school or secondary education
**Occupation – reference category = employee (wage earner)
***Political orientation – reference category = centre (DK/NR filtered out as missing)
Statistically significant associations **p<0.01, *p<0.05
Source: Authors' calculations.

We proceeded then to test binary logistic regression models of the probability of assigning individualistic causes for wealth and, conversely, structural causes. The same explanatory variables were used as in the case of poverty, with political orientation omitted from Model 1, but included in Model 2. The values of odds ratios for each variable and their statistical significance are reported in **Table 7.1 and 7.2.**

Table 7.1. Binary logistic regression for attributing wealth to individual's merit

	Model 1		Model 2	
Explanatory variables	Exp(B)	Sig.	Exp(B)	Sig.
Gender	.742**	.005	.729*	.011
Younger generation	1.130	.409	1.064	.714
Older generation	.890	.520	.821	.361
Urban	.774*	.016	.721*	.011
Ethnic minority	1.133	.439	1.020	.923
Education*: Gymnasium/ vocational education or less	.849	.293	.830	.305
Education: University degree	1.133	.430	1.058	.759
Upwards educational mobility	.747	.066	.761	.133
Occupation**: Employer or self-employed	1.005	.980	.783	.321
Occupation: Student	.907	.695	.886	.664
Occupation: Homemaker	1.594*	.010	1.294	.248
Occupation: Pensioner	.952	.798	.850	.479
Religiosity	1.005	.964	1.219	.114
Economic strain	.536**	.000	.540**	.000
Political orientation***: left	---	---	1.184	.304
Political orientation: right	---	---	1.672**	.000
Constant	.386	.000	.342	.000
Model summary				
Nagelkerke R Square	0.040		0.055	
Number of valid cases (without missing values)	3049		2244	

Notes:
*Education – reference category = high school or secondary education
**Occupation – reference category = employee (wage earner)
***Political orientation – reference category = centre (DK/NR filtered out as missing)
Statistically significant associations **p<0.01, *p<0.05
Source: Authors' calculations.

Table 7.2. Binary logistic regression for attributing wealth to social injustice

	Model 1		Model 2	
Explanatory variables	Exp(B)	Sig.	Exp(B)	Sig.
Gender	1.432**	.000	1.511**	.000
Younger generation	.852	.238	.911	.549
Older generation	1.035	.832	1.021	.912
Urban	1.323**	.004	1.295*	.024
Ethnic minority	.859	.301	.897	.558
Education*: Gymnasium/ vocational education or less	1.093	.536	1.093	.589
Education: University degree	.778	.079	.861	.360
Upwards educational mobility	1.252	.123	1.185	.304
Occupation**: Employer or self-employed	.776	.140	.926	.713
Occupation: Student	1.150	.549	1.151	.582
Occupation: Homemaker	.709*	.043	.789	.250
Occupation: Pensioner	1.128	.489	1.302	.195
Religiosity	.996	.968	.871	.222
Economic strain	1.743**	.000	1.791**	.000
Political orientation***: left	---	---	.961	.786
Political orientation: right	---	---	.718**	.006
Constant	2.057	.000	2.132	.000
Model summary				
Nagelkerke R Square	0.042		0.050	
Number of valid cases (without missing values)	3049		2244	

Notes:
*Education – reference category = high school or secondary education
**Occupation – reference category = employee (wage earner)
***Political orientation – reference category = centre (DK/NR filtered out as missing)
Statistically significant associations **p<0.01, *p<0.05
Source: Authors' calculations.

Again, the goodness of fit of the models was rather weak both for predicting the probability of attributing wealth to individual's merit (around 5.5% of variance explained), and the probability of attributing it to social injustice (around 5%). In both models, the highest effects were held by respondents' economic strain and right-wing political orientation. Economic strain considerably increased the likelihood of seeing social injustice as main driver of wealth. Respondents who asserted that their households' incomes barely allow to make ends meet were 1.8 times more likely to consider that being rich is explained by structural causes as compared to respondents who reported a comfortable household income (Exp.(B)=1.791, Sig.=0.000). Conversely, they were 0.5 times less likely to attribute wealth to individual's merit (Exp.(B)=0.540, Sig.=0.000). All other conditions accounted for in the model being equal, right-wing respondents were 1.7 times more likely than those with centrist political orientation to assign individual merit as a cause of wealth (Exp.(B)=1.672, Sig.=0.000). Conversely, they were 0.7 times less likely to assign structural causes (Exp.(B)=0.718, Sig.=0.006). Unlike in the models explaining the perceived causes of poverty, left-wing orientation did not have statistically significant effects. Relatively smaller, but statistically significant effects were held by gender: men were 1.5 times more likely than women to assert that wealth was caused by social injustice (Exp.(B)=1.511, Sig.=0.000), and 0.7 times less likely to attribute wealth to individual's merit (Exp.(B)=0.729, Sig.=0.008). Area of residence also mattered: urbanites were 1.3 times more likely than rural residents to assert that wealth was driven by structural factors and social injustice (Exp.(B)=1.295, Sig.=0.024) and 0.7 times less likely to assign it to individual merit (Exp.(B)=0.721, Sig.=0.011). This result should be unsurprising, given the deep polarization of urban areas that opens questions about the means of getting rich in a largely low-income country. Similarly to the previous models on causal attributions for poverty, homemaker status increased the likelihood of individualistic explanations of wealth, but its effect diminished below statistical significance once political orientation was introduced in the models.

To summarize: only around 5.5% of the variance of perceiving wealth as an individual merit and around 5% of assigning structural causes for wealth can be explained by the variables included in our binary logistic models (Model 2 in Table 7.1 and 7.2). However, we could depict statistically significant and robust effects in the cases of economic strain (respondents from households barely making ends meet were more likely to consider that people get rich because of social injustice), right-wing political orientation (increasing the likelihood of assigning wealth to individual merit), gender (men more likely to offer structural explanations), and residence in urban areas (increasing the likelihood of structural explanations in terms of social injustice). Unlike in the case of causal attributions for poverty, generation held no significant effect on causal attributions for wealth.

Finally, we proceeded to explain attitudes towards progressive income taxes (those with higher incomes paying a higher share of their gross earnings as income tax), using the same set of variables as in the previous binary logistic regression models (Model 1 without, and Model 2 with political orientation variables), and in addition dummies for perceived individualistic (**Table 8.1**) and, separately, structural causes of poverty and wealth (see **Table 8.2**).

The goodness of fit of the models was moderate: approximately 13.5% of variance explained by the models attributing individualistic causes *versus* 13.3% of variance explained by the models assigning structural causes (see Tables 8.1 and 8.2). Across all four models tested, the strongest predictors of support for progressive income taxes were generation (age), perceived causes of wealth, education, and urban/rural area of residence. When political orientation was added, the goodness of fit of the models improved, and left-wing political orientation significantly increased the likelihood of support for progressivity. However, the effects of the previously mentioned predictors remained significant and without notable changes in their intensity. Overall, those born before 1966 were cc. 1.7-1.8 times more likely than the mid-aged generation to favour progressive taxation (Exp.(B)=1.8, Sig.=0.004 in Table 8.1, Model 2). Respondents who attributed wealth to individual's merit were 0.5 times less likely to support it (Table 8.1, Model 1 and 2). Residents from urban areas were also 0.7 times less likely than rural residents. Having completed only lower levels of education increased by 1.6 times the likelihood of support, as compared to those with secondary education. Conversely, university degrees diminished this likelihood by 0.6 times. Political orientation towards the left increased by 1.5 times the likelihood of supporting progressive taxation, as compared to centrist orientation. The models with structuralist explanations (see Table 8.2) revealed similar effects, with those seeing wealth as result of social injustice being 1.7 times more likely to prefer progressive taxes. Importantly, perceptions of the causes of poverty had no significant effects. The same was true for gender, ethnic minority status, religiosity, and occupational status. The effects of economic strain fell on the verge of statistical significance in the models that included political orientation (Exp.(B)=1.2, Sig.=0.057 in Table 8.1, Model 2, and Exp.(B)=1.2, Sig.=0.061 in Table 8.2, Model 2). Therefore, we would not dismiss economic strain as a potential predictor of support for progressive taxation.

Given that in the previous models, for the perceived causes of poverty and wealth, respondents' educational level did not have significant effects, while in the case of attitude towards progressive taxation it appeared as a significant predictor, we analysed whether these effects were shaped by the patterns of educational mobility. More specifically, we expected that the experience of upwards educational mobility (respondent's educational level higher than her/ his mother's education) would enhance preference for progressive taxation and redistribution, and thus improving opportunities for those born in low-income families.

Table 8.1. Binary logistic regression of the probability of supporting progressive taxation in relation to attributing poverty/ wealth to individual's fault/ merit

Perceived causes of poverty/wealth:	Individual's fault/ merit (Individual causes)			
	Model 1		Model 2	
Explanatory variables	Exp(B)	Sig.	Exp(B)	Sig.
Gender	1.014	.888	1.149	.229
Younger generation	.770*	.046	.776	.088
Older generation	1.716**	.002	1.795**	.005
Urban	.744**	.004	.752*	.019
Ethnic minority	.950	.748	.773	.180
Education*: Gymnasium/ vocational education or less	1.633**	.001	1.616**	.003
Education: University degree	.624**	.001	.639**	.005
Upwards educational mobility	1.358*	.030	1.242	.177
Occupation**: Employer or self-employed	1.205	.309	1.327	.202
Occupation: Student	1.026	.905	1.137	.599
Occupation: Homemaker	1.301	.185	1.111	.646
Occupation: Pensioner	1.223	.279	1.136	.556
Religiosity	1.214	.063	1.067	.592
Economic strain	1.119	.290	1.271	.057
Wealth driven by individual merit	.524**	.000	.513**	.000
Poverty driven by individual's fault	.862	.146	.921	.492
Political orientation***: left	---	---	1.552**	.005
Political orientation: right	---	---	1.036	.778
Constant	2.717	.000	2.338	.000
Model summary				
Nagelkerke R Square	.126		.135	
Number of valid cases (without missing values)	2837		2113	

Notes:
*Education – reference category = high school or secondary education
**Occupation – reference category = employee (wage earner)
***Political orientation – reference category = centre (DK/NR filtered out as missing)
Statistically significant associations **p<0.01, *p<0.05
Source: Authors' calculations.

Table 8.2. Binary logistic regression of the probability of supporting progressive taxation in relation to attributing poverty/ wealth to social injustice

Perceived causes of poverty/ wealth:	Social injustice (structural causes)			
	Model 1		Model 2	
Explanatory variables	Exp(B)	Sig.	Exp(B)	Sig.
Gender	1.008	.937	1.142	.250
Younger generation	.771	.048	.775	.086
Older generation	1.754**	.002	1.839**	.004
Urban	.742**	.004	.761*	.024
Ethnic minority	.953	.764	.777	.187
Education*: Gymnasium/ vocational education or less	1.638**	.001	1.631**	.003
Education: University degree	.633**	.001	.645**	.006
Upwards educational mobility	1.373	.025	1.263	.145
Occupation**: Employer or self-employed	1.228	.261	1.377	.149
Occupation: Student	1.024	.913	1.142	.585
Occupation: Homemaker	1.280	.214	1.104	.664
Occupation: Pensioner	1.204	.319	1.121	.600
Religiosity	1.208	.069	1.055	.655
Economic strain	1.108	.337	1.267	.061
Wealth driven by structural causes	1.821**	.000	1.722**	.000
Poverty driven by structural causes	1.267*	.016	1.178	.155
Political orientation***: left	---	---	1.520**	.008
Political orientation: right	---	---	1.013	.917
Constant	1.258	.220	1.198	.419
Model summary				
Nagelkerke R Square	0.129		.133	
Number of valid cases (without missing values)	2837		2113	

Notes:
*Education – reference category = high school or secondary education
**Occupation – reference category = employee (wage earner)
***Political orientation – reference category = centre (DK/NR filtered out as missing)
Statistically significant associations **p<0.01, *p<0.05
Source: Authors' calculations.

As shown in **Table 9.**, both in the case of high school/ secondary education graduates, and in the cases of those with university degrees, respondents who went through a process of upwards mobility where significantly more likely to favour progressive taxation as compared to those who reproduced their parents' educational credentials.

Table 9. Perceived causes of poverty and wealth by educational level and patterns of educational mobility

Respondent's education	Gymnasium/ vocational school or less	High school/ secondary education		University degree	
In favour of progressive taxation		Reproduction	Upwards mobility	Reproduction	Upwards mobility
	83% (1.408)	65.2% (302)	79.2% (418)	54.6% (59)	64.9% (279)
		Cramer's V=0.156, Sig.=0.000		Cramer's V=0.085, Sig.=0.049	

Note: The significance of statistical association as measured by Cramer's V was computed for respondents' pattern of educational mobility and attitudes towards progressive taxation.
Source: Authors' calculations.

Critical discussion and conclusions

For complex multivariate statistical models sample size is crucial. As compared to regular opinion polls such as the Eurobarometers, the European Values Surveys, or the World Values Surveys, the sample size of this study was relatively generous, with 3,666 respondents. However, fine-line statistics involving 16 explanatory variables, with their possible interaction effects, should be interpreted with caution. In this study, the robustness of results was built upon testing in parallel potential explanatory variables for attributing poverty/ wealth to individual's fault/ merit *and* to social injustice. With only a few exceptions, discussed in detail in the previous section, all other variables held consistent effects across alternative logistic models.

An important limitation of the study was that, due to the small number of unemployed respondents, we had to exclude them from the analyses. Their precarious situation makes reasonable to assume that they attribute causes for poverty and wealth in specific ways, and separate analyses would be required. Future studies might address this issue.

The analysis of interaction-effects of respondents' education and their patterns of educational mobility provides on attitudes towards progressive taxation provides a promising venue for future research. We found that while people with higher educational credentials were in general less likely to be in favour of progressive taxation as compared to those with lower educational levels, in fact those who went through a process of upwards educational mobility were comparatively more supportive of progressive taxation. In other words, being raised in a family with lower educational degrees made people more sensitive towards redistribution issues as compared to their peers raised in families with higher educational credentials, who merely reproduced their parents' degrees. These exploratory findings require more in-depth research on social mobility trajectories, with biographical data, and better measures of socio-economic status.

Furthermore, as discussed in the literature review section, it is important to put individual-level analysis in the specific socio-economic and cultural milieu that respondents live in. Multilevel models that would include an additional layer of local-level data on poverty, economic inequality, long-term unemployment, public services, and welfare provisions would certainly improve our findings. By now, we can only point at the apparent contradiction that urban residents were more likely to attribute wealth to structural factors and social injustice, and, at the same time, they were less likely to support progressive taxation. This suggests that there might be other underlying factors, not accounted for in our models, that capture the heterogeneity of urban and rural areas and contribute to the variation of causal attributions for poverty/wealth and attitudes towards progressive taxation.

While an earlier study by Gheorghiță (2023) using 2012 data for Romania concluded that higher income earners, women, and those more trustful in political institutions were *more* likely to prefer the flat rate tax, and, conversely, respondents with more years of education, and higher social solidarity scores were *less* likely (Gheorghiță, 2023: 10), our analysis showed that perceptions of wealth as a result of social injustice held strong effects on support for progressive income tax. Given that respondent's education and economic situation were measured differently in the post-electoral survey used by Gheorghiță and in the FES 2021 survey, we should refrain from overinterpretations. However, both studies reveal that those with more favourable socio-economic positions were less likely to prefer progressive taxation. This is also in line with previous evidence offered by Domonkos (2016). In convergence with the latter author, we also found that older generations (born before 1966) were significantly more likely to support progressive taxation, despite considering poverty as caused mainly by individual's fault. A potential explanation could be that older persons rely more on public services, and thus they see the importance of income taxes for financing these services. However, we share Domonkos' view that such arguments of self-interest could only serve partial explanations. It seems more plausible that older generations, who were socialized in the years of state socialism, expect the state to reduce ramping inequalities that amplified after 1989 (Fina et al., 2021), and progressive taxation would serve as means to this end.

Support for progressive income tax grew significantly in Romania, from 45% in 2008 (Domonkos, 2016) to 64% in 2012 (Gheorghiță, 2023), and 74% in 2021 (FES, 2021). In parallel, the perception that poverty and wealth mainly stem from social injustice, and depend less on individual's fault or merit, gained ground and were shared by a large majority of the population (FES, 2021). Our inquiry focused on individual-level characteristics that shape attitudes towards taxation and, in connection to that, causal interpretations of poverty and wealth. Statistical models of binary logistic regression indicate that explanators of causal attributions for poverty and wealth only partially overlap, but the experience of economic strain has robust effects in both cases. Respondents from households that barely make ends meet were more likely to attribute both poverty and wealth to structural factors and social injustice. The experience of economic strain also seemed to increase support for progressive taxation, but its statistical effects fell below the significance threshold. However, education remained significant: those with lower credentials were more likely to favour progressive taxation, while those with higher credentials were less likely.

Importantly, after controlling for other socio-economic explanators, self-assessed left-right political orientation was associated with perceived causes of poverty/ wealth, but with a twist. Those who positioned themselves on the political left were significantly more likely to share structural explanations of poverty, while those on the right were significantly more likely to interpret wealth as the result of individual's merit. Left-right political orientation kept its explanatory power for attitudes towards progressive taxation: those on the left were 1.5 times more likely to prefer progressive taxation as compared to those with centrist orientation. Those on the right did not significantly differ from centrists in their likelihood to support progressivity.

Causal attributions for poverty lacked significant effects on the probability to be in favour of progressive taxation. In contrast, the perceived causes of wealth held statistically significant effects: those who attributed wealth to social injustice were more likely to support progressive taxation. In a country with deep income inequalities and more than a decade of flat rate taxation, these results echo a latent expectation that taxation should be a means for more equitable income distribution, that also enables redistribution and the pursuit of social justice.

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ANNEX

Bivariate statistics on the associations of the three independent variables with the set of socio-economic explanatory variables

Note: All tables represent authors' calculations.

Table A.1.1.

		Gender		Total
		Female	Male	
Perceptions of the causes of wealth	Individual's merit	18.0%	14.7%	16.4%
	Good luck	5.4%	4.0%	4.7%
	Social injustice	76.6%	81.4%	79.0%
Cramer's V=0.039, Sig.=0.003, N=3.398		100.0%	100.0%	100.0%

Table A.1.2.

		Gender		Total
		Female	Male	
Perceptions of the causes of poverty	Individual's fault	32.3%	31.0%	31.6%
	Bad luck, destiny	5.1%	8.1%	6.6%
	Social injustice	62.6%	61.0%	61.8%
Cramer's V=0.059, Sig.=0.003, N=3.444		100.0%	100.0%	100.0%

Table A.1.3.

		Gender		Total
		Female	Male	
Attitude towards progressive taxation	Not in favour of	21.9%	24.9%	23.4%
	In favour of	78.1%	75.1%	76.6%
Cramer's V=0.035, Sig.=0.038, N=3.525		100.0%	100.0%	100.0%

Table A.2.1.

		Generation			Total
		Before 1966	1966-1989	1990-2003	
Perceptions of the causes of wealth	Individual's merit	13.6%	16.8%	21.1%	16.4%
	Good luck	4.2%	5.1%	4.8%	4.7%
	Social injustice	82.2%	78.2%	74.1%	79.0%
Cramer's V=0.054, Sig.=0.000, N=3.398		100.0%	100.0%	100.0%	100.0%

Table A.2.2.

		Generation			Total
		Before 1966	1966-1989	1990-2003	
Perceptions of the causes of poverty	Individual's fault	33.9%	29.2%	32.6%	31.6%
	Bad luck, destiny	6.9%	6.5%	6.1%	6.6%
	Social injustice	59.3%	64.3%	61.3%	61.8%
Cramer's V=0.034, Sig.=0.084, N=3.443		100.0%	100.0%	100.0%	100.0%

Table A.2.3.

		Generation			Total
		Before 1966	1966-1989	1990-2003	
Attitude towards progressive taxation	Not in favour of	12.6%	27.1%	36.4%	23.4%
	In favour of	87.4%	72.9%	63.6%	76.6%
Cramer's V=0.214, Sig.=0.000, N=3.525		100.0%	100.0%	100.0%	100.0%

Table A.3.1.

		Ethnicity				Total
		Romanian	Hungarian	Roma	Other	
Perceptions of the causes of wealth	Individual's merit	16.3%	13.5%	25.4%	9.1%	16.4%
	Good luck	4.6%	4.1%	4.4%	9.1%	4.7%
	Social injustice	79.0%	82.4%	70.2%	81.8%	79.0%
Cramer's V=0.043, Sig.=0.054, N=3.398		100.0%	100.0%	100.0%	100.0%	100.0%

Table A.3.2.

		Ethnicity				Total
		Romanian	Hungarian	Roma	Other	
Perceptions of the causes of poverty	Individual's fault	31.7%	28.9%	30.9%	36.2%	31.6%
	Bad luck, destiny	6.5%	4.0%	6.5%	17.2%	6.6%
	Social injustice	61.7%	67.2%	62.6%	46.6%	61.8%
Cramer's V=0.048, Sig.=0.013, N=3.444		100.0%	100.0%	100.0%	100.0%	100.0%

Table A.3.3.

		Ethnicity				Total
		Romanian	Hungarian	Roma	Other	
Attitude towards progressive taxation	Not in favour of	23.4%	21.1%	26.4%	22.4%	23.4%
	In favour of	76.6%	78.9%	73.6%	77.6%	76.6%
Cramer's V=0.019, Sig.=0.739, N=3.525		100.0%	100.0%	100.0%	100.0%	100.0%

Table A.4.1.

		Religiosity		Total
		Frequent church attendance	Seldom or never going to church	
Perceptions of the causes of wealth	Individual's merit	16.5%	16.3%	16.4%
	Good luck	4.6%	4.6%	4.6%
	Social injustice	78.8%	79.1%	78.9%
Cramer's V=0.004, Sig.=0.997, N=3.356		100.0%	100.0%	100.0%

Table A.4.2.

		Religiosity		Total
		Frequent church attendance	Seldom or never going to church	
Perceptions of the causes of poverty	Individual's fault	32.0%	30.4%	31.4%
	Bad luck, destiny	6.8%	5.8%	6.5%
	Social injustice	61.2%	63.8%	62.1%
Cramer's V=0.029, Sig.=0.235, N=3.394		100.0%	100.0%	100.0%

Table A.4.3.

		Religiosity		Total
		Frequent church attendance	Frequent church attendance	
Attitude towards progressive taxation	Not in favour	25.7%	19.0%	23.3%
	In favour	74.3%	81.0%	76.7%
Cramer's V=0.076, Sig.=0.000, N=3.471		100.0%	100.0%	100.0%

Table A.5.1.

		Area of residence		Total
		Rural	Urban	
Perceptions of the causes of wealth	Individual's merit	17.4%	15.5%	16.4%
	Good luck	5.3%	4.2%	4.7%
	Social injustice	77.4%	80.3%	79.0%
Cramer's V=0.037, Sig.=0.096, N=3.398		100.0%	100.0%	100.0%

Table A.5.2.

		Area of residence		Total
		Rural	Urban	
Perceptions of the causes of poverty	Individual's fault	30.8%	32.4%	31.6%
	Bad luck, destiny	6.1%	6.9%	6.6%
	Social injustice	63.1%	60.7%	61.8%
Cramer's V=0.026, Sig.=0.323, N=3.444		100.0%	100.0%	100.0%

Table A.5.3.

		Area of residence		Total
		Rural	Urban	
Attitude towards progressive taxation	Not in favour of	18.2%	27.8%	23.4%
	In favour of	81.8%	72.2%	76.6%
Cramer's V=0.113, Sig.=0.000, N=3.524		100.0%	100.0%	100.0%

Table A.6.1.

<table>
<tr><td colspan="2" rowspan="2"></td><td colspan="3">Education</td><td rowspan="2">Total</td></tr>
<tr><td>Gymnasium, vocational school or less</td><td>High school or secondary education</td><td>University degree</td></tr>
<tr><td rowspan="3">Perceptions of the causes of wealth</td><td>Individual’s merit</td><td>15.1%</td><td>17.5%</td><td>18.8%</td><td>16.4%</td></tr>
<tr><td>Good luck</td><td>4.4%</td><td>3.9%</td><td>7.0%</td><td>4.7%</td></tr>
<tr><td>Social injustice</td><td>80.5%</td><td>78.6%</td><td>74.2%</td><td>79.0%</td></tr>
<tr><td colspan="2">Cramer’s V=0.045, Sig.=0.003, N=3.398</td><td>100.0%</td><td>100.0%</td><td>100.0%</td><td>100.0%</td></tr>
</table>

Table A.6.2.

<table>
<tr><td colspan="2" rowspan="2"></td><td colspan="3">Education</td><td rowspan="2">Total</td></tr>
<tr><td>Gymnasium, vocational school or less</td><td>High school or secondary education</td><td>University degree</td></tr>
<tr><td rowspan="3">Perceptions of the causes of poverty</td><td>Individual’s fault</td><td>27.9%</td><td>35.3%</td><td>37.4%</td><td>31.6%</td></tr>
<tr><td>Bad luck, destiny</td><td>6.3%</td><td>7.2%</td><td>6.2%</td><td>6.6%</td></tr>
<tr><td>Social injustice</td><td>65.8%</td><td>57.4%</td><td>56.3%</td><td>61.8%</td></tr>
<tr><td colspan="2">Cramer’s V=0.066, Sig.=0.000, N=3.443</td><td>100.0%</td><td>100.0%</td><td>100.0%</td><td>100.0%</td></tr>
</table>

Table A.6.3.

<table>
<tr><td colspan="2" rowspan="2"></td><td colspan="3">Education</td><td rowspan="2">Total</td></tr>
<tr><td>Gymnasium, vocational school or less</td><td>High school or secondary education</td><td>University degree</td></tr>
<tr><td rowspan="2">Attitude towards progressive taxation</td><td>Not in favour of</td><td>17.4%</td><td>27.2%</td><td>36.6%</td><td>23.4%</td></tr>
<tr><td>In favour of</td><td>82.6%</td><td>72.8%</td><td>63.4%</td><td>76.6%</td></tr>
<tr><td colspan="2">Cramer’s V=0.170, Sig.=0.000, N=3.523</td><td>100.0%</td><td>100.0%</td><td>100.0%</td><td>100.0%</td></tr>
</table>

Table A.7.1.

		Educational mobility			Total
		Upwards	Reproduction	Downwards	
Perceptions of the causes of wealth	Individual's merit	16.4%	16.9%	15.1%	16.7%
	Good luck	5.6%	4.4%	4.4%	4.8%
	Social injustice	78.0%	78.6%	80.4%	78.6%
Cramer's V=0.019, Sig.=0.679, N=3.109		100.0%	100.0%	100.0%	100.0%

Table A.7.2.

		Educational mobility			Total
		Upwards	Reproduction	Downwards	
Perceptions of the causes of poverty	Individual's fault	35.7%	29.2%	41.9%	32.1%
	Bad luck, destiny	7.2%	6.0%	5.1%	6.3%
	Social injustice	57.1%	64.8%	53.0%	61.6%
Cramer's V=0.065, Sig.=0.000, N=3.148		100.0%	100.0%	100.0%	100.0%

Table A.7.3.

		Educational mobility			Total
		Upwards	Reproduction	Downwards	
Attitude towards progressive taxation	Not in favour of	27.2%	21.3%	28.3%	23.6%
	In favour of	72.8%	78.7%	71.7%	76.4%
Cramer's V=0.070, Sig.=0.000, N=3.227		100.0%	100.0%	100.0%	100.0%

Table A.8.1.

		Occupational status					Total
		Employee	Self-employed or employer	Student	Home-maker	Pensioner	
Perceptions of the causes of wealth	Individual's merit	16.5%	18.3%	21.1%	22.6%	13.3%	16.2%
	Good luck	4.9%	8.3%	4.3%	5.7%	3.8%	4.8%
	Social injustice	78.6%	73.3%	74.5%	71.7%	83.0%	79.0%
Cramer's V=0.070, Sig.=0.000, N=3.269		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A.8.2.

		Occupational status					Total
		Employee	Self-employed or employer	Student	Home-maker	Pensioner	
Perceptions of the causes of poverty	Individual's fault	30.7%	46.9%	36.1%	20.3%	32.8%	31.9%
	Bad luck, destiny	6.4%	5.4%	5.2%	7.4%	6.8%	6.5%
	Social injustice	62.9%	47.7%	58.7%	72.3%	60.4%	61.6%
Cramer's V=0.084, Sig.=0.000, N=3.303		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A.8.3.

		Occupational status					Total
		Employee	Self-employed or employer	Student	Home-maker	Pensioner	
Attitude towards progressive taxation	Not in favour of	30.4%	26.6%	36.6%	19.5%	13.0%	23.2%
	In favour of	69.6%	73.4%	63.4%	80.5%	87.0%	76.8%
Cramer's=0.199, Sig.=0.000, N=3.384		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table A.9.1.

		Economic strain		Total
		Comfortable living	Affording only the bare necessities or less	
Perceptions of the causes of wealth	Individual's merit	19.8%	12.2%	16.1%
	Good luck	5.5%	3.9%	4.7%
	Social injustice	74.8%	83.9%	79.2%
Cramer's V=0.113, Sig.=0.000, N=3.368		100.0%	100.0%	100.0%

Table A.9.2.

		Economic strain		Total
		Comfortable living	Affording only the bare necessities or less	
Perceptions of the causes of poverty	Individual's fault	36.0%	26.7%	31.6%
	Bad luck, destiny	6.5%	6.5%	6.5%
	Social injustice	57.4%	66.8%	61.9%
Cramer's V=0.102, Sig.=0.000, N=3.413		100.0%	100.0%	100.0%

Table A.9.3.

		Economic strain		Total
		Comfortable living	Affording only the bare necessities or less	
Attitude towards progressive taxation	Not in favour of	27.4%	18.8%	23.3%
	In favour of	72.6%	81.2%	76.7%
Cramer's V=0.102, Sig.=0.000, N=3.496		100.0%	100.0%	100.0%

Table A.10.1.

		Political orientation			Total
		Left	Centre	Right	
Perceptions of the causes of wealth	Individual's merit	14.0%	13.8%	20.7%	16.3%
	Good luck	5.1%	5.8%	3.9%	5.0%
	Social injustice	80.9%	80.3%	75.4%	78.7%
Cramer's V=0.066, Sig.=0.000, N=2.406		100.0%	100.0%	100.0%	100.0%

Table A.10.2.

		Political orientation			Total
		Left	Centre	Right	
Perceptions of the causes of poverty	Individual's fault	27.0%	32.9%	35.0%	32.3%
	Bad luck, destiny	7.6%	6.0%	6.0%	6.4%
	Social injustice	65.4%	61.1%	59.0%	61.3%
Cramer's V=0.047, Sig.=0.030, N=2.430		100.0%	100.0%	100.0%	100.0%

Table A.10.3.

		Political orientation			Total
		Left	Centre	Right	
Attitude towards progressive taxation	Not in favour of	18.8%	26.3%	25.0%	24.1%
	In favour of	81.3%	73.7%	75.0%	75.9%
Cramer’s V=0.069, Sig.=0.003, N=2.471		100.0%	100.0%	100.0%	100.0%

STUDIA UBB SOCIOLOGIA, 69 (LXIX), 1, 2024, pp. 85-107
DOI: 10.2478/subbs-2024-0003

THE PATH FROM ROMANIA TO THE ITALIAN DOMESTIC CARE SECTOR: THE FIRST STAGE OF THE DECISION-MAKING PROCESS ON LABOUR MIGRATION

Irina-Miruna HARABAGIU[1]

ABSTRACT. This paper aims to propose a multi-stage model for the decision-making process on labour migration that takes into account both individual agency and structural dimensions along political-institutional, economic, and social factors. While it is focused on the case of Romanian women's migration to the Italian domestic care sector, it can be applied for the analysis of other types of labour migration too. From a historical perspective, Romania underwent major political, economic, cultural, and social transformations after 1989 and throughout the years of EU integration and membership, that influenced transnational labour migration. With the help of relevant population statistics and qualitative interviews with Romanian women working in Italy, I illustrate how the three structural dimensions contribute to the start of the individuals' decision-making process on migration. The political-institutional dimension both enables a culture of labour migration and conditions or disinhibits the possibility of migrating abroad for work. Through a series of disruptions, the economic dimension creates distress, which brings certain individuals in a state of needing alternative solutions to ensure their livelihood. As they search for solutions, these people will be exposed to the option of labour migration. This exposure, however, takes place in the social dimension, which represents the aggregate of individuals' social relationships. Finally, by assuming the roles of mentors and/or migration facilitators, social actors influence individuals to become aspiring migrants and to follow a migratory destination. Considering working abroad as an option (available, needed and possible) represents the first stage of a decision-making process that the individuals go through. At the end of it, the actors will become from aspiring migrants- novice labour migrants.

Keywords: labour migration drivers, structure-agency dialectic, decision-making process, Romania, Italian domestic sector

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Introduction

International labour migration has become an important aspect of nowadays society, and its impact cannot be denied. As such, this phenomenon has been picked and probed for decades, especially when it comes to the question "why do people migrate?".

This Gordian knot has been approached both from macro or micro perspectives or through including and adapting theories from other scientific domains, each of them having its merits for explaining the phenomenon. But as society developed, the explanatory power of theories decreased and "why do people migrate?" remained an unconquered battle, leaving contemporary researchers with the quest to find a different approach.

As most of today's knowledge is based on the cumulative stock of past empirical approaches, let's take a step back in time and go through the major theoretical frameworks regarding labour migration.

Theoretical frameworks in researching labour migration

The first contributions came from economy. Neoclassical economic theory (Ravenstein, 1889, 1976; Hicks, 1932; Lewis, 1954; Harris and Todaro, 1970), attributed migration to wage differences between markets. From this perspective stemmed the push and pull factors (Bogue, 1969), according to which macro structural contexts from two countries generate specific conditions that attract and drive migration from one to another.

In an attempt to reconcile the individuals' evident capacity for agency with structure (Porumbescu, 2015), the new economics of migration theory emphasized the interdependence between actors involved in migration as opposed to the previously assumed individual independence (Stark, 1991). Labour migration was seen as a behaviour aimed to avoid financial deprivation caused by collapses in labour, credit or social security markets (Massey et al., 1993) and to diversify incomes. The household, as a directly affected social unit, was considered both a production and consumption unit, self-regulating through the migration of its members to other labour markets.

The dual labour market theory assigned migratory dynamics to the fragmentation of labour markets into two segments: a primary, well-regulated and remunerated one, appropriated mainly by natives, and a secondary, precarious segment, avoided by the natives and left for lower status groups such as ethnic minorities and migrants. Despite its precarious nature, the secondary labour market is nevertheless more profitable for migrants than working in their countries of origin. One could consider these as attraction factors similar to those proposed by the economic theory (apud. Piore, 1979 in Massey et. al, 1993).

The world-system theory (Wallerstein, 1974), attributed migration to transformations in markets, which in turn occurred due to the penetration of capitalist organizations from developed countries into peripheral and poor countries. The purpose of these capitalist octopuses was to ensure the global circulation of exploited natural resources, to access cheaper labour and to create new markets (Massey et. al, 1993). Eventually, individuals from the peripheries or the semi-peripheries of the global capitalist world-system would migrate towards "the core" of developed countries in order to access precarious jobs there.

Originating in biology and introduced to migration research in 1970 by Mabogunje (apud. Willekens, 2021), systems theory views the world as a series of interconnected elements. It argued that international migration forms a connected geographical network of migratory flows, capital, information and goods (Willekens, 2021: 6). Willekens (2021: 3-4) equals migration systems with migration networks, as asserts that the study of migration through the lenses of systems theory implies a processual approach, whereby "structuration and development (becoming)" is emphasized over "structure (being)" (Willekens, 2021: 4). At the same time, he stresses that migration networks should not be confused with migrant networks. The latter refers to the ways in which "migration is embedded in the life course and migrants are part of social network" (Willekens, 2021: 46).

From this perspective, migration network theory remains actually focused on migrant networks as it explores "the interpersonal ties that connect migrants, ex-migrants or non-migrants, in both countries of origin and destination, through ties of kinship, friendship or community" (Massey et al., 1993: 448). Starting from a moment t0, migration perpetuated and developed through human connections that facilitated its reproduction. These linkages gradually reduced the costs and risks of migration until migration became accessible to newcomers, at which point it would decelerate (Massey et al., 1993: 449).

Other attempts to explain the dynamics of migratory flows in relation to the development of migration networks have resulted in the fragmentation of migration into phases. Faist (2009) divided migration to Germany in the 1960s into two phases. The initial phase of migration was led by pioneer migrants who engaged in migration processes through institutional or individual forms of recruitment. The pioneers then laid the foundations of networks that, in turn, facilitated the start-up of migration projects for others. As such, an accumulation phase began, where more and more migrants used and further developed these social networks.

Cingolani (2009) divided circular migration between Romania and Italy in four phases, in close relation to the historical events that Romania went through: the discovery - between 1990 and 1995 (right after the fall of the communist regime in December 1989), the consolidation - between 1996 and 2001 (when border crossings were still difficult, but high rates of unemployment and rampant inflation put pressure on the population), the circulation - between 2002 and 2007 (easier access to EU countries and the prospect of EU integration), and the opening of the borders - after 2007 (Romania becomes EU member state, meaning free circulation of labour and capital within the EU).

Adjacent to the impact of facilitating networks and institutions, six other elements arising from the societal effects of a country's first waves of migration would increase the incidence of migration. Cumulative causality, as Myrdal (1957, apud. Massey et al., 1993) called it, described how each act of migration changed the social context in which future migration decisions were made. Firstly, migration was perpetuated through a continuous reporting of relative deprivation among households. Another important aspect was the agrarian property. Some migrants invested in land acquisition for prestige and retirement security, but those purchases constrained the opportunities for the remaining farmers. Other migrants, who decided to invest in agricultural production, outperformed the local farmers due to their higher access to capital for mechanization (apud. Massey et al., 1987, in Massey et al., 1993). The contact with other modes of labour and higher consumption developed a culture of migration, which further predisposed individuals to emigrate. Skilled workers were followed by the unskilled as the sectors in host countries diversified and the home country stagnated due to the exodus. Educational investments in the home country increased the chances of accessing foreign markets. In host countries, the immigrants changed the social perception of work, creating a class of stigmatized jobs, rejected by natives, thus increasing the demand for immigrant labour (Massey et al., 1993: 453).

Institutional theory, another branch of process theory, addressed the economic institutional actors whose roles were to facilitate migration. Between the attempts of capital-rich states to limit immigration, and the high demand of labour migrants from poor countries to fill in job vacancies, a migration industry developed: international transport agents, intermediaries on the labour market, providers of accommodation, private insurance companies and so on (Massey et. al, 1993; Benner, 2009; Castles, 2010; Lalani and Metcalf, 2012). These actors might be connected to social networks, but their activity was viewed through a different lens, rather organizational and through its ties to the grey market and crime, but also state institutions and transnational organizations.

In this paper, I was interested to find a theoretical framework that captures the dialectic between agency and structure, taking inspiration from Gidden's structuration theory. Giddens (1984) argued that social life is neither the product of social structures nor the result of individual action, given that the former limit and condition human perceptions and actions, and the latter have the potential to modify the structure.

Starting from a perspective that has agency in the limelight, labour migration became a means to an end. It was assumed that people plan their lives looking to achieve a series of needs and desires, and mobilize a series of resources (cognitive, effort or other) to meet them. Planning the type, amount and direction of these resources resides in their cognition, which researchers called the decision-making process (Willekens, 2021).

The attempts to approach the dialectic between actors and structure in the decision-making process are multiple, and so are the results, stating from two to five decisional phases (Janis and Mann, 1977; Kley, 2011; Klabunde et al., 2017, Willekens, 2021). Carling (2002) for example, suggested that people migrate based on the desire and the possibility to do so. As such, two stages occurred: the development of the idea that emigration is beneficial, making it an aspiration, and the ability to achieve the aspiration.

Both the aspiration and the ability were considered in close relationship with the macro-dimensions. While the aspiration arose from „a particular emigration environment, encompassing the social, economic and political context in which particular social constructions of migration exist" (Carling, 2017: 2), the ability to emigrate was conditioned by an immigration interface, namely a set of immigration regulations imposed by the host state. However, if the interface from the origin state would not permit emigration, then the ability would be negated. As such, I consider the migration interfaces of both the country of origin and the country of destination of utmost importance.

To summarize, researching labour migration is a delicate task, due to the multitude of elements that make it up. As such, anchoring in a narrow theoretical perspective is counterproductive and inappropriate to the actual empirical situation. This requires the researcher to make a multifaceted effort: to integrate arguments from multiple theoretical frameworks to the extent that it suites the phenomenon and to give way to the possibility of addressing the socio-historical process of Romanian migration, by taking into account the structure-agency dialectic.

Previous case studies on Romania

Most Romanian case studies analysed migration through the lenses of economic theories and confuse actors' decisions with migration drivers or with migrants' profiles (Cristea, Dănăcică and Noja, 2021). However, these empirical studies set forth a series of arguments that might be taken into consideration. Ianos (2016) indicated a correlation that puts the imbalance of the internal labour market and the intensification of labour migration in an inverse relationship: the more the absorption capacity of the internal labour market decreased, the more migration intensified: predominantly internal, but the author indicates that the international migration is subjected to the same logic.

Along the same line, Simionescu (2016) indicated as push factors for migration between 1991 and 2014 poverty, high taxes, and slow increases in wage earnings Noja and Moroc (2016) analysed wage differences between origin and destination countries, and saw them as main drivers for labour migration.

Regarding the pull factors towards a series of destination countries, Simionescu (2017) and later Davidescu, Ghinararu and Maicaneanu (2019) emphasize bigger GDP, lower unemployment rates and taxes, higher life expectancy (as a result of better social protection and living standards) and population density (which again might mean better living standards), but also the presence of social networks.

Others, such as Andrén and Roman's (2014), even though they did not aim to follow the structure-agent dialectic, asserted that migratory dynamics could have determinants in the political, economic and social historical contexts of the 2000s. The role of social networks on perpetuating migration was also recognized (Sandu, 2010), especially as a shared recipe for financial success.

Methodology

This paper contributes to the sociological understanding of the decision-making process of aspiring migrants by investigating the set of structural elements that trigger the decision-making process. These elements will be considered as belonging to the macro and meso levels, above the individual actor, along three main dimensions: the political-institutional, the economic, and the social dimension.

Compared to other theoretical approaches that considered either the impact of an event in the individual's life (Janis and Mann, 1977) or exposure (Willekens, 2021), contagion (Faist, 2009) or propagation of the option of working abroad (Sandu, 2010) as the start of the decision process, this paper follows all these elements encompassed in the economic and social dimensions. However, it is also necessary to take into account the political and institutional dimension. Through analysing the regulations regarding migration, I will determine the role of the migration interface (Carling, 2017) upon the individual's attitude towards migration and their ability to migrate. I will also show that the influence of these structural dimensions is continuous and forms a dialectic with the actors that operate inside them.

Using an abductive reasoning, this paper represents a case study on Romania's female labour migration between 2002 and 2012. This historical period is important due to some major events for Romanian migration abroad: the legislative preparations regarding migration on the eve of EU accession (2007), the post-communist economic destructuring, and the 2008-2012 financial crisis.

To this end, I investigate the major legislative regulations regarding migration in the eve of joining the EU and the main disruptions on the economic markets. Then, I compare the results based on this analysis of the macro and meso level factors with the results of a qualitative research, through the thematic analysis (Boyatzis, 1998), of 26 life stories of women who migrated between 2002-2012 in order to work in the Italian domestic sector.

Data collection was done between 2017 and 2024, based on in-depth, semi-structured interviews. All names represent pseudonyms. For this paper, the sections on which I concentrate on are the description of household and family life prior to considering labour migration, coming into contact with the idea of working across borders, the structural drivers for considering working abroad and the series of events that followed until the actual migration.

Individual agency and structural dimensions that shape the decision process over labour migration

The political -institutional dimension

Starting from 1990, Romania entered a process of reshaping its legislation in order to become a member of the European community (Diminescu, 2009). Even before the start of EU accession in 1997 and during the years of EU integration, Romanian legislators prepared bilateral labour agreements with several European countries (Diminescu, 2009; Șerban and Stoica. 2007), and issued a series of laws aimed at developing and modernizing border crossing points, creating an international niche for labour intermediation, and protecting workers in the European space, preventing cross-border crime and human trafficking.

Between 1990 and 2006, eleven labour agreements have been signed, with countries such as Germany, Hungary, Switzerland, Luxembourg, Portugal, Spain, France and Italy, with the aim of "recruiting labour by EU countries from the countries of Central and Eastern Europe, for the jobs which required highly qualified labour or for those refused by the local population" (Constantin et. al., 2004: 63). Romania's aspiration of that period was aligned with the world-system theory arguments and had strong ties with the dual labour market theory.

In addition to these efforts, for the countries with which agreements had been signed, or were to be signed, the Romanian state apparatus created its own institutions to ensure recruitment, information and monitoring of compliance with labour contracts across borders. The first of its kind was the National Office for the Recruitment and Placement of Labour Abroad (ONRPFMS). After a series of regulations, it became the Office for Labour Migration (OMFM) and was abolished in the summer of 2007. Its activities were taken over by the National Employment Agency (ANOFM). ANOFM became a member of the EURES (European Employment Services) network in 2007, through which it continued to mediate employment contracts abroad. One cannot therefore deny the fact that the Romanian state had fully assumed its role as an intermediary in the logic of globalized markets, laying the foundations of an institutional infrastructure that would ensure the perpetuation of work migration in the long term. Moreover, the Romanian legislators also opened the possibility of intermediation as a niche of economic activity in the private market, through the Law 156/2000, which offered the possibility to companies established under a certain activity code to mediate work abroad. Between 2005 and 2012, the intermediation niche for international labour registered an 80% increase, from 1008 to 1801 units registered in the records of the Labor Inspection Office[2].

As part of the changes undertaken by Romania with the aim of becoming an EU member state, the development of a migration interface is also noteworthy. Two historical moments are of outmost importance here: the 1st of January 2002, and the 1st of January 2007. The first one marks the visa-free access for Romanian citizens in the Schengen area, for 90 days in a six-month period (Diminescu, 2009; Ciobanu and Elrick, 2009). However, they had to have a passport and meet several other criteria[3], such as proving the Romanian border agent that they possessed a minimum amount of 500 euros, a medical insurance, and a return ticket or the green card for the car. The values of these amounts were briefly modified until the end of 2006, in an effort to limit the exit of certain population categories that, in the view of political elites, could have jeopardized the sensitive image of Romania in the European space (Șerban and Stoica, 2007).

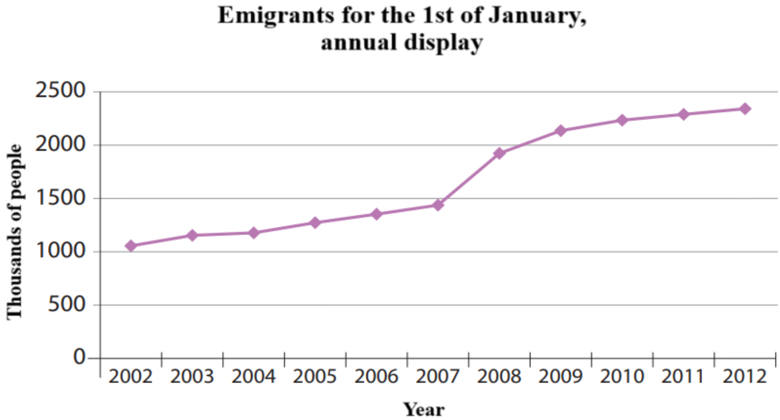
[2] From the data of the annual activity reports of the Labor Inspectorate, downloadable from the website: https://www.inspectiamuncii.ro/raport-anual-al-activitatiii-inspectiei-muncii, accessed in September 2024)

[3] By the Government's Emergency Ordinance no. 144/2001 and Order of the Ministry of Interior no. 177/2001

On January 1, 2007, Romania became a member state of the European Union, a fact that brought with it a huge elasticity of the migration process, as holding a national identity card entitled Romanians to travel throughout the EU (Cingolani, 2009).

Migration gained major momentum between 2002 and 2012, ranging from 1.000.000 to almost 2.500.000 (see Figure 1), many of whom migrated towards Spain and Italy (Sandu, 2010: 64).

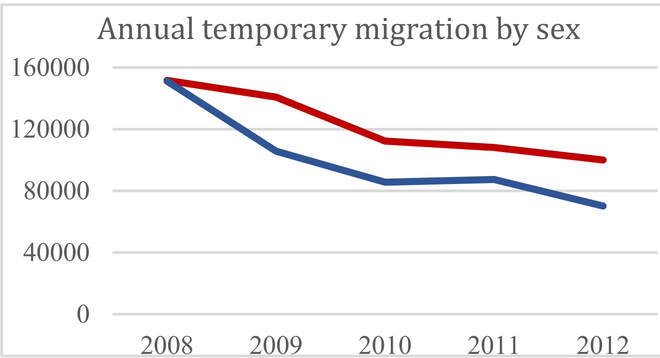
Figure 1. The number of Romanian migrants on January 1 of each year, period 2002-2012



Source: NIS/INS, Romanian International Migration, 2014.

Moreover, starting from 2009, female temporary migration exceeded male migration for several years (see Figure 2 below).

Figure 2. Annual temporary migration, between 2008 and 2012, displayed by sex



Source: Author's graph. Data retrieved from the INS-Tempo online dataset, accessed January 2023. Unit of measurement: number of people

Although there are no available national statistics on the purpose of leaving the country, taking into account legislative transformations, the economic situation of the country, and socio-demographic characteristics of migrants, one can reasonably assume that a large part of Romanian migration abroad represented migration for work. Both in the period before Romania's accession to the EU and after, the majority of migrants were part of the working age groups (18-64 years), accounting for over 80% of the total number of temporary migrants abroad (INS, 2014; INS Tempo On-line, 2024). The proportions of migrants with only primary education increased from 23% before the waiving of visa obligations in the Schengen Area in 2002 to 41% in 2011. In the same period, the share of those with a high school or professional education decreased: from 68% before 2002 to 38% in 2011 (Sandu, 2018: 269). Also, as I mentioned earlier, there is a substantial increase in the number of women involved in transnational migration, most of whom were married and had low educational level (Sandu, 2018). As we will see in the analysis of the second dimension, these categories of people are most likely victims of the labour market decline that occurred during the financial crisis of 2008-2012.

In this time span, Italy was an important player. The attractiveness of the Italian labour market is mirrored by the gradually increasing number of Romanian residents: from 61,000 in 2002 (Sandu, 2010: 85) to 933.000 in 2012 and 1.081.000 in 2013 (Sandu, 2018: 251) as a result of first or repeated migrations to Italy. Moreover, during the financial crisis, some Romanian workers abroad switched destinations, migrating temporarily to Italy at the expense of Spain, due to the relatively lower impact of the financial crisis in the former country and its stable demand for foreign labour (Sandu, 2018).

The high rates of Romanian labour migration should be analysed not only in relation with the cultural acceptance of working abroad as a legitimate strategy to improve living standards, but also having in view the institutional setup that facilitated migration, besides migrants' social networks: labour agreements within the EU, a labour intermediation apparatus, laws that permitted and regulated labour migration.

The migration interface had the capacity to condition (between 2002 and 2006) or disinhibit migration intentions (after 2007) but individual agency also shaped migration in specific ways.

Between 2002 and 2006 the phenomenon of "working tourists" crystallized (Ban, 2009): Romanians used the legal gateway that allowed them to enter other European countries as tourists in order to engage in (at the time) illegal labour abroad, at least for the duration of three months of visa-free residence permitted by the law.

It should be noted that not all aspiring migrants met the criteria imposed by the law to leave the country as tourists, as described in a previous section of this paper. However, intermediary agencies took up the role to provide the necessary resources for labour migration disguised as "tourism" and allowed aspiring migrants to exploit the legal loopholes in exchange for paying for their "services". It becomes obvious that a social connection between aspiring migrants and profit savvy actors was crucial in this phase of Romania labour migration abroad. The connections between different types of actors are comprised in a third, social dimension. Between 2002 and 2006, the actors with the most instrumental impact regarding exiting the Romanian border and circumventing the law were the international transporters. They exploited the legal loopholes through pretence loans, bribing border agents, etc.

Finally, Romania's accession to the European Union in 2007 represented the strongest disinhibiting factor, due to the possibility of migration to European states based on national identity cards.

The economic dimension

Adjacent to the post-communist economic destructuring that Romania was going through (Anghel and Horvath, 2009), the global economic crisis hit as a "shock wave [that] highlighted the imbalances and vulnerability of the Romanian economy, characterized by poor economic management and a long list of unfinished reforms" (Stănculescu and Stoiciu, 2012: 26). Although the recession began to make its presence felt only in the third semester of 2008, the situation worsened rapidly in the following years, especially due to the "reduced capacity of the Romanian economy to create jobs and absorb the workforce available" (Anghel and Horvath, 2009: 395).

As such, the labour market situation worsened over time: the number of employees decreased drastically, and it did not return to the same values as in 2008. Moreover, the number of unemployed increased by more than 100,000 people, while job vacancies shrank to less than 25 thousand places (see Table 1).

Table 1. Number of employees, unemployed ILO and job vacancies between 2008 and2012 in Romania

Indicators	2008	2009	2010	2011	2012
Employees	6,149,781	5,940,866	5,648,607	5,697,235	5,734,492
Unemployed	549,371	624,036	651,695	659,426	627,209
Job vacancies	92,222	38,625	24,239	26,057	24,825

Source: Author's table based on the INS-Tempo online dataset (retrieved in August 2023).
Unit of measurement: number of people, number of vacant jobs. Annual figures for the period 2008-2012.

In addition, the average monthly expenses declared by households were just below the average household incomes (see Table 2).

Table 2. Comparative display of monthly average incomes per household and monthly average expenses per household, the value of the minimum wage salary and the value of the unemployment allowance, expressed in euro, between 2008 and2012 in Romania

Monthly average (euro)	2008	2009	2010	2011	2012
Incomes	199.8	189	188.4	197	193
Expenses	179.5	167	168.7	178	175
Minimum wage salary (before taxes)	136.6-147.5	142.2	158.7	164.3	168.1
Unemployment allowance value	109	110	112	124	94.60

Source: Author's table based on the INS Tempo Online dataset for total incomes, expenses, and unemployment allowance (data retrieved in August 2023). The data are expressed in total per household member. The figures differ depending on the number and type of members in the household, such as dependent children.

Minimum gross wage before taxes according to the National Agency for Fiscal Administration and the National Institute of Statistics. All the values displayed were converted from Romanian lei (Ron) to Euro, according to the exchange rate of the Romanian National Bank (BNR) for each year.

The proportion of the salary in the household total income amounts more than 60%, the rest being supplemented from other sources, such as social benefits [4] (such as family allowances, disability benefits, social assistance benefits etc.). A decrease in wage income would therefore drastically impact household living standards.

The fact that making ends meet was difficult is shown in the results of a survey conducted by NIS annually[5], where most of the respondents stated that they found various degrees of difficulty in paying their expenses (see Table 3).

[4] The exact mean for the social benefits' percentage is 23,7%, derived from a 5 year mean calculus, based on NIS Tempo On-line data, accessed August 2023.

[5] More information about the survey here: http://80.96.186.4:81/metadata/viewStatisticalResearch.htm?locale=ro&researchId=5458

Table 3. Self-reported difficulty to pay the bills between 2008 and 2012 in Romania

% Capacity to pay the bills	2008	2009	2010	2011	2012
Great difficulty	19%	19.3%	21%	20.8%	21.6%
Difficulty	29.3%	28.7%	27.8%	27.9%	28.2%
Some difficulty	36.5%	37.5%	39.3%	39.1%	37.9%
Pretty easy	11%	10.2%	8%	8.4%	8.6%
Easy	3.7%	3.9%	3.3%	3.5%	3.4%
Very easy	0.5%	0.4%	0.6%	0.3%	0.3%

Source: Author's table based on the INS Tempo-Online dataset (retrieved in July 2024). Data provided by the annual household budget survey on a sample of cca. 9,000 households. The section in question seeks self-reporting on a Likert scale consisting of 6 dimensions: 1- With great difficulty, 2- With difficulty, 3- With some difficulty, 4- Fairly easy, 5- Easy, 6- Very easy.

The biggest payment delays (see Table 4) were registered for electricity bills, followed by house maintenance bills, such as water, gas or heating. Delays in paying telephone subscriptions or bank instalments also increased during the financial crisis. The only element with a reduced percentage is the rent, but this is most likely due to the increased proportion of homeowners among Romanians.

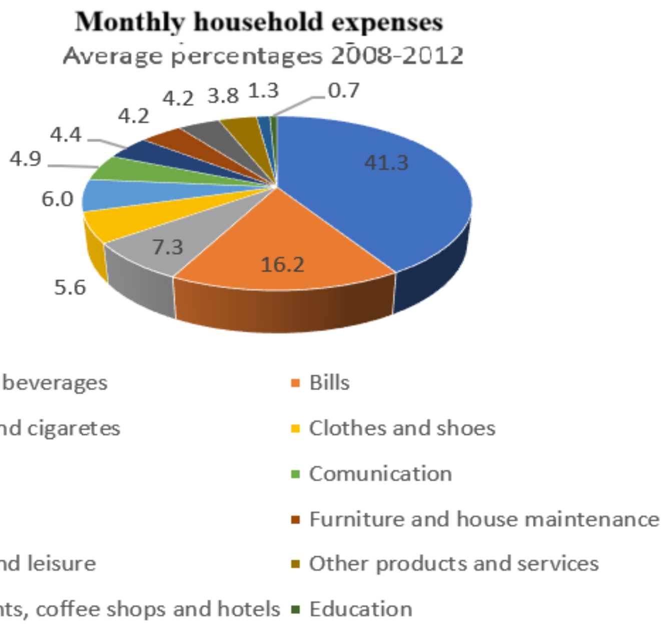
Table 4. Bill payment delays, expressed in percentages, between 2008 and 2012 in Romania

Type of delayed bill	2008	2009	2010	2011	2012
Rent	1.5%	2%	1.4%	1.5%	1.3%
House maintenance	49.4%	50.9%	48.6%	51.7%	51.9%
Electricity and radio subscription	51.8%	54.2%	51.6%	54.6%	53.7%
Telephone subscription	15.6%	27.4%	27.8%	28.5%	30.7%
Instalments on consumer loans	7.2%	9.6%	12.6%	14.3%	11.7%

Source: Author's table based on the INS Tempo-Online dataset (retrieved in July 2024). Data provided by the annual household budget survey on a sample of cc. 9,000 households.

Moreover, canvasing the monthly household expenses, one might find that more than 50% of the budget was usually spent on food and bills, leaving the rest of the needs to be scarcely addressed (see Figure 3), or as we've seen before, delayed.

Figure 3. Visual display of monthly household expenses



(Source: Author's table based on the INS Tempo-Online dataset (retrieved in July 2024). This is part of a survey on family budgets[6], carried out by questionnaire, with a quarterly and annual frequency, which includes a total of 38.016 households. The displayed percentages represent average values for the five years analysed, for each category.

Poverty rates, measured against a relative income threshold based on the Eurostat methodology, disproportionately affect families with three or more children, and also single- parent families (see Table 5).

[6] More information about the methodology of the survey here: http://80.96.186.4:81/metadata/viewStatisticalResearch.htm?locale=ro&researchId=5457

Table 5. Relative poverty rates by type of household between 2008 and2012 in Romania

Relative poverty rates by type of household	2008	2009	2010	2011	2012
Household with dependent children	26.5%	25.7%	26.2%	27.8%	29%
Single parent with at least one dependent child	41.3%	33.1%	32.6%	38.9%	33.4%
Two adults with one child	13.8%	15.3%	16%	18.2%	17..6%
Two adults with two children	24%	24.1%	26.4%	26.6%	26.1%
Two adults with three or more children	57.3%	55.7%	62%	52.4%	57.5%
Three or more adults with children	25.6%	23.9%	23.8%	28.2%	30%

Source: Author's table based on INS Tempo-Online dataset (retrieved in November 2023).

The family situations of my respondents fit into this logic. Most of them reported losing their jobs and facing the need to be the breadwinner of the family. The women often reported dysfunctional family situations, in which their life partners did not actively participate in the economic support of the household or were no longer part of the family nucleus at all.

Overall, I could identify in my respondents' cases similar factors leading to taking into consideration migration as those reported by other scholars, and these are based on economic reasoning (Anghel and Horvath, 2009; Fedyuk, 2016).

Between 2002 and 2006, all my respondents migrated for work as locum tenens for experienced migrants who had indeterminate contracts. As such, the labour campaigns had the rationale of a financial supplement, cumulated with already existing incomes, and carried out in periods of annual leave or periods of inactivity in the employing organizations.

Between 2008 and 2012, however, the factors that contributed to taking into consideration migrant labour as a long-term enterprise were cemented: the precarious situation of the labour market, the disappointment regarding the occupational prospects for women over 40 years old, reduced access to social protection measures or finding out that these social benefits were much below family needs.

From the perspective of neoclassical economic theory, these structural elements represent push factors, while the higher wages available in the Italian domestic work sector can be seen as pull factor. Although, as we saw before, even if only one person in the family becomes the victim in the destructuring of the labour market, the effect is felt by the entire household. This observation therefore takes us into the territory of the theory of the new economics of migration, which does not repel the push and pull factors. However, these structural elements do not automatically lead to migration. Followed by a culminating event, they create difficult living circumstances that put individuals in a state of being open to other solutions for ensuring a livelihood. Migrating for labour in the Italian domestic sector becomes that solution only after taking into account the social dimension. Although it exerts most of its influence throughout the second stage of the decision-making process, the individual faces with the alternative of working in the Italian domestic sector within the social dimension.

The social dimension

One must take a small step back and consider the fact that migration would not have appeared as an option for earning a living if there had not been a social precedent and a social contagion (Faist, 2009).

Although the number of women who migrated before Romania's accession to the EU is small in my sample, none of the people interviewed emigrated without being exposed in one way or another to the idea of working abroad. In the period before Romania's accession to the EU, the contagion (Faist, 2009) or propagation (Sandu, 2010) was limited to the network of personal relationships. The possibility of working across borders was embodied either by the existence of migrants in the extended family or in the circles of friends, or by distant stories about third parties who migrated for work and succeeded (a "friend of a friend" type).

After Romania's accession to the EU, however, the contagion of the idea of working across borders was more extensive, no longer limited to friends or relatives. Phrases such as "I had heard", "it was known" found in several of my interviews indicate that the option of working abroad had become part of the common sense.

Although the pioneers (Faist, 2009) or innovators (Moretto and Vergalli, 2008) were the first to migrate and became the living examples, imitators (Moretto and Vergalli, 2008) could start their migration projects only after the idea of working abroad became viable for them. In order for that to happen, each aspiring migrant has to go through a decision-making process.

The next four stages of the individuals' decision-making process are addressed in forthcoming papers (Harabagiu, forthcoming). However, I must stress here that before aspiring migrants could implement the decision to migrate, they must solve three practical dilemmas: transportation, accommodation, and identifying a job. Their outcome represents costs and risks in reaching the desired goal of making a living from working abroad. Here lies the importance of the ties between the aspiring migrant and the various social actors in the migration industry: the power of the migration industry to solve these dilemmas and minimise costs and risks.

All migration projects of my respondents were achieved through pre-arranged forms of migration (Anghel and Horvath, 2009). Between 2002 and 2006, acquaintances and relatives who had migration experience represented the main facilitators. A great aid was of course represented by the international transporters' legal loophole exploitation capacity. After 2007, however, aspiring migrants could also have greater chances of contacting international labour market intermediaries, on which we will focus later.

The experienced migrants act both as mentors and facilitators, by providing a series of services related to migrant labour niche. Let's take the case of one of my interviewees, Daniela (not her real name). She was helped by her friend with a loan for the cash amount needed to start the project, with accommodation and finally free mediation for a job. This type of direct facilitation disinhibits the aspiring migrant because the cost of migration does not have to be covered in advance and can be delayed when the first financial gain occurs (the first payment for her services). The same goes for the accommodation costs, which could be covered by the experienced migrant. Finally, finding a job with the help of an experienced migrant gives the novice migrant confidence regarding the potential success of the migrant labour campaign, through the culturally imbedded relational expectations. Most of the time, in mediation situations involving the network of relatives, friends and acquaintances, the aspect of risk of failure is considered minimal.

In the absence of close social network facilitators, migrants may also rely on third parties such as recruiters, transporters, housing brokers, whose market roles facilitate migration and form a "migration industry" (Castles, 2010).

Although most of these social actors operate in the private sector, the Romanian state had its own mediation agency, whose role was to mediate contracts between Romanian citizens and foreign employers. However, none of my respondents emigrated using the services of the National Agency for Employment (ANOFM) through the EURES network. Instead, they used intermediary services in the private sector and/or in the grey economy.

International labour market intermediaries were usually connected to various collaborators with instrumental roles for transforming labour migration in a for-profit endeavour. Most of the Romanian intermediaries operated thorough a double terminal, with one intermediary agent in Italy, or with a more complex network, consisted of a transport agent and an accommodation agent (which could be the same as the Italian intermediary).

Most of my respondents stated that they found the intermediaries' contact details through advertisements in the print media or on the Internet, then phoned them and either arranged a meeting with them or received the contact details of other transnational collaborators.

For a fee, most of the Romanian intermediaries took upon themselves all the stages necessary for migration: the transport to Italy, accommodation, mediation and transport to the new workplace, three job offers, job counselling, employment contracts with benefits and social security measures. As the costs and risks seemed dealt with in advance, the start of migration projects with intermediaries' aid appeared as very beneficial to the aspiring migrant, despite of the fee. However, the promises rarely materialized, instead creating intense coercive context for novice migrants:

> The bosses (the Italian intermediaries) were very direct and told us that if in a few days at most we will not speak Italian, and uh, we don't fit their norms, they will send us back to Romania. After paying 200 euro as a fee in Romania, plus a 130 Euro fee at the agency, plus the bus money, plus food... Because we were 33 people (at the accommodation site), and they fed us a pot of 15 liters of water and 3-4 bags of spaghetti, with a faint sugo a day (red pasta sauce). As such, we bought more food ourselves… They (the Italian intermediaries) used to enter the agency's saloon, they would turn on the TV and start shouting "imparati parole" (learn words) (...) I want to tell you that I spent 10 days in the agency... It was an ordeal for me that time. I was so gutted and disappointed… and scared, because every day women came back (from the job offer tests) in bad shapes and for good reasons. One, for example, was beaten up, bruised on her right hand, because she had taken care of an old man with senile dementia, and when he got angry, he would beat her with his cane...
> (Mrs. Florica, migrated for the first time in 2010, at the age of 49)

The third category of actors with a huge contribution to external migration is represented by the international transporters. Thus, although GEO no. 144/2001 and Order of the Ministry of Interior no. 177/2001 specified that Romanian citizens had to prove to the border agent that they possess at least 500 euros, we learn from Mrs. Maria (not her real name) a method of circumvention facilitated by international carriers: the pretence loan.

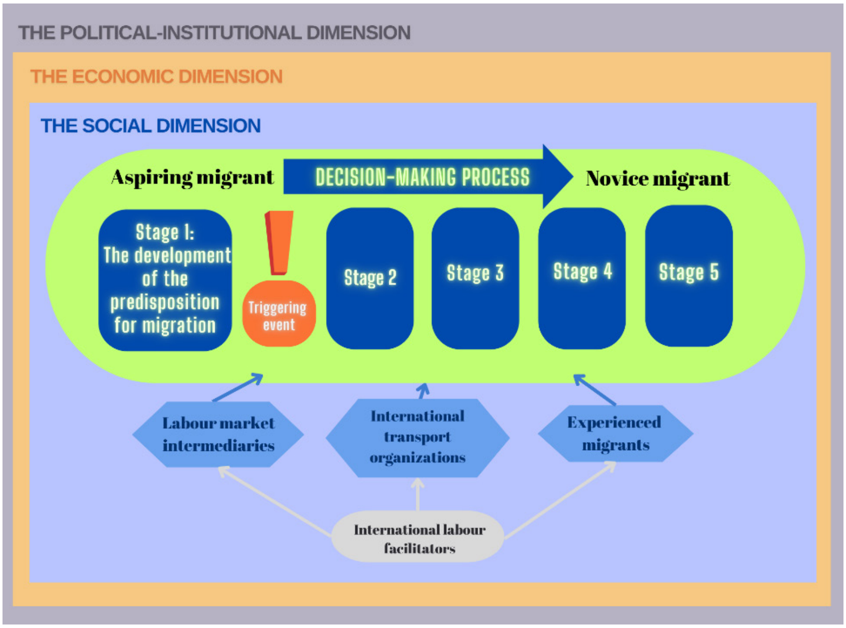
> I went with a company, they made (sold) me a ticket, and the money that.... it was like as I was going on a trip for....3 days? 5 days, I don't know exactly, (let's say) a week. One had to have the spending money. Well, the driver gave us the spending money…those money that we had to show at customs, because we faked that we were tourists. (...) After the customs agent left, we gave the money back to the driver. (Mrs. Maria, emigrated for the first time in 2005, at the age of 42).

Another strategy was bribing border officers, to overlook that the passengers did not meet the criteria. Bribery was usually organized through a joint collection of money from bus passengers. Moreover, if there were migrants who exceeded the three months migration period allowed, the same bribery scheme was applied, but this practice was ensured only by carriers experienced in these activities and with previously formed border connections.

Conclusions and discussion. Proposal of a decision-making process diagram for labour migration

As systems theory proposes, one must consider individuals as gradually included in various systems, with various functions in their lives. If the primordial one is the family, the more the individual creates and uses ties with other actors and structures, the more they will have an inverse impact on the individual's life. It is therefore a dialectic between structural dimensions and individuals (see Figure 4) which have a crucial role in shaping labour migration. These dimensions are the political-institutional, economic, and social dimensions.

Figure 4. Diagram with the structural dimensions and actors that influence individual's decision-making process concerning labour migration



Source: Author's graph.

The influences of the three dimensions upon the individual one are not necessarily temporally disparate, although I arranged them separately for a more complete comprehension of the phenomenon.

The highest dimension which the individual is connected to is the political-institutional one. The gradual building of a culture of labour migration and of a migration interface created a positive change in actors' attitudes towards labour migration. Regulations that condition or disinhibit migration also shaped the actors' ability to migrate.

The median dimension is the economic one. In Romania, the destructuring of the labour market, poverty, and the inadequacy of social protection measures represent the elements that brought individuals in a need for another solution to ensure their livelihood and that of their family.

The option of labour migration as a livelihood solution was insinuated to individuals inside the social dimension. This dimension is closest to individuals, because it is being composed of all individuals' social ties with relatives, friends and acquaintances, but also with other actors with important roles in facilitating migration. These actors influence the aspiring migrant to become a labour migrant by assuming the roles of mentors and direct migration facilitators.

The contagion of the migrant labour option (from within the social dimension), together with the necessity for a livelihood option (from within the economic dimension) and the possibility of pursuing the option (from within the political-institutional dimension) transforms the individual into an aspiring migrant. This represents the first stage in a five-stage decision-making process. At the end of the stages, the individual becomes a novice labour migrant.

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STUDIA UBB SOCIOLOGIA, 69 (LXIX), 1, 2024, pp. 109-129
DOI: 10.2478/subbs-2024-0004

PAID PARENTAL LEAVE IN SERBIA: THE GENDER PERSPECTIVE

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ABSTRACT. For the last two decades, Serbian family policies have gone through several changes in accordance with contemporary trends and changes in family life and also influenced by EU regulations and recommendations. Current legislation is in line with the gender equality principle, enabling both parents to exercise their rights and to pursue a work-life balance. However, when it comes to paid parental leave, the Serbian legal framework is considered inflexible in terms of choosing the combination of length of leave and the remuneration amount. In this paper, we argue that Serbian parental leave policies must be analysed in relation to the specific context of a (unfinished) post-socialist transition at the semi-periphery of Europe, population decline and strong familism. The burden of parenthood is still predominantly on women's shoulders, even though ideas about a "new fatherhood", more involved in child rearing, have become more widespread. Whether they are employed or not, women/mothers remain the primary caregivers, while the typical Serbian family can be described as a male breadwinner model.

Keywords: paid parental leave, gender perspective, regulation, practice, Serbia

Introduction

Many studies examine how parents adjust to having a child, especially for first-time parents (Holopainen et al., 2020; Bradley and Slade, 2011). Caring for a child modifies existing family practices and generates new ones in order

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to overcome the challenges of parenting. There is a matter of synchronizing: parental roles within the family and parental and other social roles of family members, as well as keeping the continuity of family functions under the novel circumstances. All these significantly define the chances to provide well-being for family members and the family as a unit.

Providing support for families with children is not only an issue of individual capacities of family members, but also a matter of social and political responsibility. (Inter)sectoral family-friendly policies "provide three types of essential resources needed by parents and caregivers of young children: time, finances and services" (UNICEF, 2019: 1) aiming to facilitate the transition to parenthood, enable life – work balance, and prevent poverty.

The efficiency of family-friendly policies depends not only on the measures themselves, but also on the social context and the characteristics of families. Feminist welfare research showed that the gender perspective has great importance in analysing social policies and social security issues (Pascall, 1997; Randles, 2018). Gender determines "who does what and how often" (Lammi-Taskula, 2008: 133), both in public and private social life. It shapes patterns of family roles and practices, roles and positions in labour division, access to and control over various forms of capital, and opportunities to participate in decision-making and have an impact. Even though contemporary social policy programs tend to be gender-neutral, one's gender considerably impacts the access to and use of social benefits and services, and their outcomes. Gender is a highly relevant aspect of social welfare, bearing in mind the gap between the economic activity of men and women. It generates different types of vulnerabilities for men and women due to their different family roles and expectations about harmonizing family and other (in particular professional) social roles.

Balancing between family and work is supposed to be facilitated by a particular set of family policies, such paid maternity and pregnancy leaves, paid paternity leaves for fathers, paid parental (or childcare) leaves, home care leaves, family & child allowances, child care services (nurseries, kindergartens etc.). In this paper, we focus on paid parental leave as one of the most popular measures in Europe which encompasses "employment-protected leave of absence for employed parents, which is often supplementary to specific maternity and paternity leave periods, and frequently, but not in all countries, follows the period of maternity leave" (OECD, 2022: 1). Keeping this in perspective, this paper aims to identify and analyse main traits of the social context for implementing the measure of paid parental leave in ensuring the well-being of families with small children. We analyse the issue within the contemporary Serbian society having in mind its three analytically important aspects: (unfinished) post-socialist transition (Jović, 2022) at the (European) semi-periphery (Blagojević Hughson, 2015), significant population decline (Nikitović, 2022), and familism (Tomanović et al., 2016).

Those sociological markers enable us to explore the implications of gender on paid parental leave regulations and their outcomSes. We also present the EU policy and legal context, due to its relevance to Serbia as a candidate country.

Gender and paid parental leave – practicing contemporary motherhood and fatherhood

In the last decades, paid parental leave gained significant attention, both from scientists and politicians. The issue is becoming more important not only for working parents, but for their employers as well. It is closely connected with the changes in contemporary families, as well as in the labour market. The variable that intersects all mentioned is gender.

Gender roles and practices, statuses, identities and attitudes, in both private and public social spheres, are expressed and determined by gender regimes (Connell, 1987). Contemporary gender regimes, especially social democratic ones (Walby, 2020), strive towards equity, altering traditional parenthood, especially fatherhood. The concept of what a father is and should do has significantly changed over the past few decades. The father role has evolved tremendously (Sarkadi et al., 2008) - from an ever-absent breadwinner and strict disciplinarian to a warm and present partner and co-parenting figure. From the former perception that taking care of a child is like "doing time" (LaRossa, 1988), fathers nowadays aim to spend more time in child rearing activities, becoming deeply involved in all aspects of child development (Lamb, 2010; Bianchi and Milkie, 2010). There is an abundance of studies showing that children whose father is involved have many benefits later in life: higher academic achievement, emotional stability, better social adaptability (Adamson and Johnson, 2013; Baker et al., 2018; Henry et al., 2020; Jeynes, 2016). The concept of "new fatherhood" aligns with the practice of equally shared parenting, where both parents are equally responsible for the children's well-being (Deutsch, 2001). Such practice "debunks myths about gender differences in the ability to give care" and "resists conventional images of motherhood and fatherhood" (Deutsch, 2001: 26). In return, it has positive effects on the child, on the formation of parental identity and parental relationship (Keizer et al., 2019; Miller, 2010; Simović-Zvicer, 2022).

Despite observable changes, the gap between societal values of equally shared parenting and its practice persists (LaRossa, 1988) as "beliefs about gender equality and parenting roles do not necessarily converge" (Craig and Mullan, 2011: 836). How the actual equally sharing parenting would be practised depends not only on the couple, but also on the social circumstances they live in. According to Craig and Mullan (2011: 835), "limited time availability, unequal relative resources and conformity to traditional gender ideology" are the main factors that determine how couples manage to share their "responsibilities for market and non-market work". Additionally, equal sharing of parental responsibilities depends on the characteristics of the prevailing breadwinner model, the gendered division of labour, work organization climate, maternal gatekeeping, available formal and informal support for parents, policy goals and measures, etc. As cultural patterns and gender standards are reflected in various institutional frameworks, we can question whether public discourses aim to encourage equal parental involvement in childcare or not. This issue is important in terms of establishing policy measures for parental leave, especially in countries where the transformation of gender regimes towards greater equality is in its infancy, like Serbia.

The social context of becoming (and being) a parent in Serbia

The majority of families in Serbia are families with children (68.9%) (RZS, 2022), of which 62.9% are married couples with children while 31.3% are single-parent families (predominantly, mother with child/children). In most of the families, there is one child (54.3%) or two children (36.1%) (RZS, 2022). 18% of the children living in families are younger than five years old (RZS, 2022). For the last three decades, Serbia has faced continuous depopulation (Nikitović, 2022), both due to the negative net migration rates and negative population growth. Fertility rates have been in decline for at least half a century, and recently, they have been around 1.4 and 1.5 (Nikitović, 2022; Vuković, 2022; Šobot, 2022), i.e. the lowest fertility rates registered in the recent history of the country. Even though some demographic trends correspond with the second demographic transition, which is characterised by low fertility rates, delayed marriages, delayed transition to parenthood, high divorce rates, high share of births out-of-wedlock, leading Serbian researchers (Bobić, 2006; Bobić and Vukelić, 2011; Tomanović et al., 2016) showed that these trends were not exclusively grounded in what were seen as "typical" postmodern values and norms. The second demographic transition was shaped by the values of individualisation, the rise of "higher order" needs, gender equality, changes in the motivation for parenthood, increased mobility, multiple lifestyles, etc. However, the specific structural features of the Serbian (post)transitional society at the semi-periphery of global capitalism also influenced fertility, parenthood, and parenting.

(Unfinished) post-socialist transformations in Serbia are characterized by transitional features that were also present in other Central and Eastern European countries after 1989, but also exceptionally deep economic, political and social crises (Jović, 2022; Babović, 2009). As a society in the semi-periphery, Serbia is burdened with economic and political instability, increased poverty and social exclusion, lack of social security and institutional trust, impaired quality of life (Hughson, 2015). In such context, prospective parents face high fertility costs, and they might delay or even renounce at parenthood. Due to the slow and unsteady economic development (World Bank, 2022; IMF, 2023), young people in Serbia face high risks of unemployment and/or underemployment. Moreover, employed young people are often engaged in temporary, low-paid or freelance jobs, and their precarious labour market positions only worsen their risk of poverty and social exclusion. Lack of financial stability significantly slows down their emancipation from the family of origin, leading to delayed marriage/cohabitation and/or procreation. Additionally, low and unstable income increases young people's sense of precariousness and poverty, thus hindering their transition to parenthood. High fertility costs also imply a significant demand for other resources that parents utilize in their daily child-rearing practices. For example, one of the main issues for the parents-to-be/new parents is to obtain adequate housing (Tomanović et al., 2016). As young people in Serbia have difficulties when it comes to owning and/or renting apartments, they are often forced to live with their parents (Miletić-Stepanović, 2011). Living in a multigenerational household can be rewarding in terms of the help for the young parents, but it can also be a major stressor and cause of intergenerational conflicts (Miletić-Stepanović, 2011). Joint living with his/her parents "reproduces asymmetry in gender and generational relations" (Tomanović et al., 2016: 194), thus obstructing the individualisation of a young couple/young parents.

Institutional support is the second major resource that new parents need and use in their everyday child upbringing practices. Current Serbian family-related policy offers several measures for the (new) parents: financial, organizational and advisory (Tomanović et al., 2016; Perišić, 2016). However, due to the semi-peripheral position of Serbian society and unfinished post-socialist transition (Jović, 2022), young people face a lack of reliability of public services (Mojić, 2012: 115). Recent research has shown that the transition to parenthood is not supported adequately by relevant institutions and that institutional support was lesser than the support that was asked for (Tomanović et al., 2016; Stanojević, 2018). Lack of finances and institutional support increased the parents' need for social capital. This especially refers to parental support, both monetary (regular and/or extra cash-flows from old parents to young parents) and non-monetary (e.g. living in his/her parents' house, helping in household chores, taking care of children, giving advice). According to Tomanović (2012: 141), three quarters of young parents reported getting help from their parents. Substantial use of parental support corresponds with the South-European (Mediterranean) model of transition to adulthood and parenthood. This model relies on a sub-protective (familist) transitional order (Walther, 2006) in which, even though the public sector provides some support, the state also counts on the major help offered by the families of origin. The inconsistency of family policies aimed to provide support for parents with dependent children matches with the (post)transitional restrictions regarding public sector engagement in social security and the advanced role of the private sector.

Serbian gender regimes at the semi-periphery: between the reproduction of gender gaps and new fatherhood practices

Semi-peripheral societies, such as Serbia, are often characterised by a certain level of re-traditionalisation and re-patriarchalization which are seen as consequences of its "never finished reforms", "diachronicity" and "hybridity" (Hughson, 2015: 81-82). In circumstances of the previously discussed negative population growth (Nikitović, 2022), society often seeks someone to blame. In Serbian culture, parenthood is (still) perceived as one of the crucial life events, often linked with becoming an adult (Tomanović et al., 2016). Thus, young people are expected to procreate. The burden of parenthood is habitually put on women's shoulders. Becoming a wife and a mother is considered an important foundation of female identity. Such social norms and expectations are deeply embedded in the gender regime. The current semi-peripheral Serbian gender regime is characterised by several important features: "intensive use of female resources in both public and private sphere; the existence of a 'self/sacrificing micro-matriarchy' (SSMM); the existence of a 'crisis of masculinity'; extremely strong patriarchal ideologies" (Blagojević Hughson, 2015: 256). It is based on high utilization of women's unpaid work (Hughson, 2015). Moreover, gender impacts the likelihood to benefit from structural and functional changes during post-socialist transformations – women are less likely to benefit from transitional structural and market adjustments, due to, among others, "incompatibility of economic and reproductive role in modified economic circumstances" (Dokmanović, 2017: 49).

Despite its evident bifurcation in the last decades (Blagojević Hjuson, 2013), current Serbian gender regime still reproduces significant gender gaps. Available gendered statistics reveals gender gaps in terms of employment, wages, time management, caregiving practices, public engagement/power, experience of violence, etc. These gaps are reflected in the significantly lower value of the gender equity index in Serbia as compared with the EU-average (58.0 and 67.4, respectively). The lowest scores were registered in domains that involve authority, time management, knowledge, and money. Based on current trends, Serbian society will need, arguably, six decades to achieve full gender equity (Babović and Petrović, 2021). Furthermore, female employment rate is 14.7 percentage points lower than male's (41.9% and 56.6%, respectively), while female unemployment rate is 15.6 percentage points higher than male's (37.3% and 52.9%, respectively). Female long-term unemployment rates are also higher than men's. Women are twice less likely to be self-employed as compared with men, they are more frequently part-time employed, mainly due to providing care for the children, old, sick and/or disabled family members (RZS, 2020). Women are at greater risk of losing their jobs due to parenting than men (Đan and Vrbaški, 2019: 33). The wage gender gap was 8.8% in 2018; the highest wage gender gap was registered for the 30-39 and 40-49 age groups (12.2% and 12.3%) (RZS, 2020). Women are exposed to higher risk of monetary poverty then men (23.6 and 22.7, respectively), and also higher risk of poverty or social exclusion (32.3 and 31.2, respectively) (RZS, 2020). Women spend twice as much time than men in unpaid, domestic labour, whether they are employed or not. 41.2% of women above the age of 18 years old are engaged in taking care of others on a daily basis (Babović and Petrović, 2021); in addition, married women with preschool child/children spend almost eight hours (full-time shift) in unpaid domestic labour (RZS, 2020). Every fifth woman has experienced physical and/or sexual violence after she reached the age of 15 (Babović and Petrović, 2021).

Considering the role of fathers, research on contemporary Serbian families showed that father's role is "defined, seen and estimated as the role of a less warm parent, distant in the relationship with the children and that the relationship with the father is at greater risk of becoming dysfunctional, with a low share of intimacy, positive exchange and trust in the relationship durability" (Mihić, 2010: 198).

Observed gender gaps have a significant impact not only on fertility rates, but also on (gendered) parenthood practices. There are three existing models of parental relations and practices in Serbian families: traditional, modern and post-modern (Tomanović-Mihajlović, 1997; Babović, 2006; Blagojević, 1997; Blagojević Hjuson, 2013; Hughson, 2017). Motherhood and fatherhood in identified models vary significantly – from strict gendered role division (in the traditional model), through slightly modernized gendered role division (father`s supporting engagement in some of the children's everyday activities) up to a gender egalitarian parenthood. The last model implies fathers' active participation in children's all everyday activities (Stanojević, 2018). In addition, new fatherhood implies changes in relationships between parents/partners, but also between the father and relatives, public institutions, the labour market, and society as a whole.

Women in Serbia still have a dominant role in taking care of children/family members in general. This especially refers to everyday, repetitive tasks such as feeding, bathing, dressing, preparing food, etc. Whether employed or not, women remain primary caregivers, particularly for the new-borns, infants and toddlers. A typical Serbian family is a male breadwinner family (Mirić, 2022).

However, some recent modifications in gendered parental activities should be acknowledged (RZS, 2017). They can be described as a mild turn away from "traditional fatherhood" towards a glimpse of "new fatherhood" practices. This implies that the father is not the only/unquestionable moral authority (as in the traditional family), and that the decision-making process has been democratized so that the wife/mother and also, the children have a voice and participate in decision-making. Furthermore, the division of gender roles is changing towards a more egalitarian model. Gender roles and their corresponding practices become less strict and more fluid. Importantly, the father establishes and develops a deep emotional connection with children and participates in various childhood activities such as playing, helping with school assignments, providing everyday care.

The legal outlines of family policies in Serbia)

The beginning of establishing social policies in the support of families in Serbia can be traced back to the 1920s and 1930s. First measures were aimed at improving the social status of families with children, but they had "humble effects in practice" (Vuković, 2009: 271). The modernization of family policies corresponded with women's increasing entry on the labour market in the second half of the 20th century, under the state-socialist regime. Socialist family policies were a combination of population policy and social protection measures aiming to "provide economic and social security for families, create space for family planning, improve support for parenthood in the field of labour, and improve the adequacy of housing" (Sekulić, 2016: 141-142). Despite certain structural and functional changes, the traditional gender division of family roles remained. The solution for harmonizing parenthood (and in particular motherhood) and work was found in establishing affordable child care institutions, such as nurseries and kindergartens (Tanasijević, 2016). Permanent and occasional, supplementary financial benefits were also provided, and their scope broadened by the end of the 1980s (Vuković, 2009). Even though gender equality was constitutionally guaranteed during the entire socialist period, family support measures were mainly focused on mothers.

During the 1990s, families with dependent children in Serbia were in a specifically vulnerable position. Widespread unemployment and poverty, the proximity of war and the growing number of refugees urged families to ask for additional state support. However, similarly to the whole welfare system, family policy institutions and the benefits and services they provided have collapsed. Consequently, support for families with dependent children was pushed back into the private sphere, depending solely on (often insufficient) family resources.

For the last two decades, Serbian family policies have undergone notable changes. The implemented reforms aimed to boost biological reproduction and facilitate transition to parenthood, enable better targeting of social protection, prevent poverty (especially child poverty), expand coverage (number of beneficiaries), facilitate administrative procedures, and harmonize national laws with the EU regulations. Also, the reforms aimed to improve policy budgeting by introducing censuses or special conditions for individuals to practise their legal rights. Current legislation on paid child care leave is in line with the gender equality principle, enabling both parents to exercise their rights to balance professional and family roles.

Serbian family policies offer both monetary and non-monetary parenting support for families with minor children (Perišić, 2016; Službeni glasnik RS, 2009/2023). Paid parental leave is one of the measures guaranteed to every parent with an employment contract (Službeni glasnik RS, 2005/2018; Službeni glasnik RS, 2009/2023). According to the legislation, paid parental leave starts after the end of maternity leave and lasts no longer than 365 days from the birth of a child.[7] The duration of paid parental leave is regulated progressively, in relation with the number of children born (Službeni glasnik RS, 2005/2018).

Even though most often mothers take up the paid parental (child care) leave, in Serbia fathers are also entitled to paid child care leave. Serbia is one of the 44% of countries globally that provide fathers the right to take up paid parental leave[8] (World Bank, 2023). However, fathers' uptake of paid child care leave is conditioned by the fact that both parents have to be employed and take the leave alternatively (not at the same time) (Službeni glasnik RS, 2005/2018). Fathers also have the right to paid maternity leave only in case that something

[7] The Labour law (Službeni glasnik RS, 2005/2018) allows additional paid parental leave in the case of the necessity of taking special care of a child. The right is granted based on the permission of the competent medical authority. Additional leave is time-limited to five years from the day of the child`s birth which puts parents of children with difficulties in development in quite unfavourable position.

[8] Data refers to fathers' legal right to "at least one day of paid leave for the birth of a child, or if the law reserves a portion of paid parental leave specifically for fathers—that is, through 'use-it-or-lose-it' policies or fathers' quotas; or if fathers are individually entitled to paid parental leave" (World Bank, 2023).

prevents the mother from using the benefit (e.g. mother's death, serious illness, institutionalization, child abandonment, etc.) (Službeni glasnik RS, 2005/2018). Additionally, fathers are entitled to a paid paternal leave up to five working days in the case of childbirth (Službeni glasnik RS, 2005/2018. art. 77). Employed parents have the right to financial compensation during his/her paid parental leave (Službeni glasnik RS, 2009/2023). The benefit is paid directly to the right holder from the national budget. The salary compensation baseline is calculated based on the sum of all taxed net income of a parent in the year and a half before parental leave (art. 13) divided by 18. It encompasses a gross amount which is subjected to taxation and, since the 1st of January 2022, it cannot exceed the equivalent of five national average month salaries. However, the law does not guarantee a minimal monthly salary compensation[9] to a parent during his/her paid parental leave which often leads to a situation in which the parent receives a rather low amount of payment, which jeopardizes financial security of his/her family.

Since the 2000s, expenditures on paid parental leave as a % of GDP increased, despite the decline in fertility rates and employment rates (Stanić and Matković, 2017: 44, 52). Some authors described salary compensations as generous and adequate, in terms of length and amount (Matković et al., 2018). However, the authors based their analysis on the older version of the regulation (in use until June 2018). According to the newer version of the regulation (Službeni glasnik RS, 2018/2023), the calculation has changed which can result in poor payment (as explained earlier). Additionally, the issue of flexibility has been raised – the paid parental leave in Serbia is considered inflexible in terms of the "possibility to choose combination of length of leave and the amount of compensation" (Matković et al., 2018: 84). Unfortunately, available national data on paid parental leave expenditures are not gender sensitive, therefore the analysis of welfare payments transferred to mothers and fathers separately is not possible. It is nonetheless highly likely that the amount of paid parental leave benefits transferred to mothers is greater, as mothers make up the majority of beneficiaries. Yet, it would be interesting to analyse the trends in payments transferred to fathers, compared to the number of fathers on paid paternal leave and the length of their absence from work.

Despite the legal opportunities, only a few fathers in Serbia have taken paid parental leave. According to Lebedinski and Vladisavljević (2022), 328 fathers took paid parental leave in 2019 (0.51% of total births). The majority of them were in their 30s, living in major urban areas (Belgrade, Novi Sad, Niš).

[9] Minimal month salary compensation is guaranteed only for the mothers on the first three months of the paid maternal leave. The amount granted is set on a level of one national average monthly salary.

Despite uncertain data, a growing trend in the number of beneficiaries over the last couple of years can be observed (Macura, 2023), whilst there is a strategic plan to increase the number of fathers on paid parental leave by 50% up to 2025 (MBPD, 2022). However, there is reasonable doubt in achieving the set goals due to the current economic, social and cultural setting, and obstacles that Serbian parents face in their everyday activities.

Paid parental leave from an international perspective: challenges and opportunities

Different EU strategies, action plans and directives aim to harmonize parental, professional, and family responsibilities. Yet, until the 1990s, parenting was mostly associated with motherhood (Simović-Zvicer, 2022), so the father's role as an (equally responsible) parent was not properly normatively addressed. Due to the "gender turn" largely driven by academics and civil organizations at the end of the 1980s and beginning of the 1990s, EU work-family balance policies, renamed later as work-life balance policies, began to incorporate the gender perspective more thoroughly. According to Aybars (2007: 569), exercising the right to (paid) parental leave has been promoted based on the "soft" (non-binding) "coordination approach to employment and social policy", reflected in several important documents (European Social Charter, 1961/1996; Community Charter of the Fundamental Social Rights of Workers, 1989; European Employment Strategy, 1997). However, such measures were mainly voluntary for member states and often partial. Consequently, additional strategic documents have been adopted (Guidelines for Growth and Jobs, 2005; Roadmap for equality between women and men, 2006; Strategy for equality between women and men (2010-2015), 2010, European Pact for Gender Equality, 2011) in order to encourage member states to include a gender equality perspective in their National Reform Programs (Aybars, 2007).

Since the 1990s, the "hard" legislative framework obligatory for all Member States has been developing, mainly oriented towards the principles of equal employment and the work-life balance[10]. The Directive 96/34/EC (1996) was the first[11] to directly address the issue of gender-equal right to parental leave. It regulated the issue for both male and female employees, based on the birth

[10] In 1983, there was also an attempt to adopt the European Commission proposal on the issue, but it didn't pass (de la Porte et al., 2022).

[11] Council Directive 96/34/EC of 3 June 1996 on the framework agreement on parental leave concluded by UNICE, CEEP and the ETUC (1996) indicated that conditions of such leave need "to be defined by the law and/or collective agreement in the Member States".

or adoption of a child, with a duration of at least three months. The Directive 2010/18/EU (2010) is of particular importance as it provides employees an individual right to parental leave, lasting minimum four months, based on the birth or adoption of a child, whereby at least one month of parental leave must be non-transferable ("daddy months" or "daddy-quota"), but without obligation for remuneration during the leave (de la Porte et al., 2022).[12] Even though the directive brought some legal improvements, its implementation did not contribute to an increase in the number of fathers using the right to parental leave (Borg, 2018; Simović-Zvicer, 2022). Also, it did not considerably improve mothers' reconciliation of professional and parental duties and their labour market position.

All of these developments has led to the adoption of a new, Work-Life Balance Directive 2019/1158/EU (2019). According to Caracciolo di Torella (2020: 73), this new directive addresses the issue of work-life balance "no longer just as a problem for women or (at a stretch) parents, but as something that can (and will) affect most workers". Also, it applies to the broader range of employment arrangements, following changes in the contemporary labour market, especially atypical forms of employment and labour market transitions. Work-Life Balance Directive (2019) introduces new obligatory rights (paternity and carers' leave) and reinforces additional rights (parental leave and flexible working arrangements) (Caracciolo di Torella, 2020). According to the Directive (2019/1158/EU, 2019), both parents have the right to paternity leave, regardless of their marital or family status which enables equalizing status of other parent/partner, including parent/partner from same-sex unions. This was a significant innovation compared to the previous Directive 2010/18/EU. Since August 2022, each of the EU Member States needs to offer a minimum of 10 working days of paid paternity leave, compensated at least at the sick pay level. The implementation of this right is not conditioned by the previous duration of the employment, but the Directive (2019) leaves the possibility for the payment of paternity leave to be conditioned by the previous duration of the employment up to six months before the birth of the child. In addition, member states have an option to decide whether to regulate the usage of paternity leave more flexibly - one part before and one part after the birth of the child (Simović-Zvicer, 2022). However, in certain countries, actual practices do not comply with the Directive 2019/1158/EU, because they provide fewer days of paternity leave than the minimum prescribed by the Directive (Simović-Zvicer, 2022).

[12] This Directive (2010) provided protection "against dismissal and less favourable treatment" based on the application for parental leave or the usage of such leave, although detailed conditions of protection are not specified. However, Directive (2010) does not prescribe employer`s obligations regarding remuneration during parental leave. It was left to member states to set down the specifics (Directive 2010/18/EU, 2010).

Directive 2019/1158 (2019) also allows each parent at least four months of parental leave, of which two months are paid and non-transferable. This period is extended, compared to previous directive, in order to encourage fathers to take up parental leave (Directive 2019/1158/EU, 2019). Parents have the right use the leave in a flexible form (e.g. full-time or part-time) before the child reaches a specified age. Also, each member state defines the level of compensation for the two non-transferable paid months. Even though the right to paid parental leave for both parents is currently guaranteed as an individual right in all EU countries, noticeable variations in terms of the leave are observable (e.g. the length, compensation levels, whether it is a family or individual right) (Van Belle, 2016). The maximum duration of parental leave is in the Czech Republic, Lithuania, France, Hungary, Slovakia and Spain (up to the child's third year). However, in those countries only one parent can be entitled to a salary during this period (Simović-Zvicer, 2022). On the other hand, some countries of the European Union contain different measures in the case of sharing parental leave between parents (Simović-Zvicer, 2022).

The Work-Life Balance Directive (2019/1158/EU, 2019) advocates for a higher level of the paid parental leave benefit, equivalent to the maternity benefit (de la Porte et al., 2022). Member states determine the amount of the received payment, but the sum "shall be set in such a way as to facilitate the take-up of parental leave by both parents" (Directive 2019/1158/EU, 2019). Nevertheless, this Directive (2019/158/EU, 2019) is "only one more step on a long journey" (Caracciolo di Torella, 2020: 80), given that it does not address the issues regarding motherhood progressively (e.g. IVF, surrogacy, breast-feeding, enhanced dismissal protection), it ensures only modest guarantees to the implementation of rights, and it does not provide clear ground on the rights of the most vulnerable workers, such as those with atypical labour contracts (Caracciolo di Torella, 2020).

Even though there is no sufficient qualitative data on fathers' uptake of paternity and parental leave (Van Belle, 2016), fathers across the EU use their right to paternity leave at higher percentage compared to parental leave (Simović-Zvicer, 2022), but still much less than mothers do. 90% of fathers throughout the EU do not use their rights to parental leave (Borg, 2018). The number of fathers on parental leave varies – from less than 1% (e.g. Greece, Cyprus) up to more than 40% (e.g. Sweden) (van Belle, 2016). The reasons for the non-usage of parental leave by fathers are various: cultural reasons and beliefs about gender, different regulations on the obligation to provide full payment for the entire period of using the parental leave, especially for the fathers (EPRS, 2022), as well as inflexible national solutions regarding the possibility of transferring parental leave to the other parent.

The existing experience shows that, when a transfer of one part of the parental leave from the mother to the father is foreseen as a possibility, there is often not enough institutional support to implement this kind of solution in practice. In addition, father's parental leave is sometimes treated not as his right, but as a "gift offered by the mother" (O'Brien and Wall, 2018). This shows that the perception of parental leave as the natural right of the mother is still a dominant one.

Conclusions

Paid parental leave is an important measure of family policies, promoting the well-being of a new-borns and parents, but also assisting parents in "managing employment obligations in the presence of young children" (Farré, 2016: 50). Social policies, particularly family policies, are gendered. They are heavily influenced by gender regimes and perceptions of (a)typical gender roles and practices, statuses, identities and attitudes in both private and public social spheres. When it comes to parental leave policies, the above-mentioned notions are translated into regulations which can promote equally shared parenting or discourage it.

Serbian parental leave policies must be analysed related to the specific context of (unfinished) socialist transition at the semi-periphery of Europe, population decline, and strong familism. Due to the semi-peripheral position of Serbia and its unfinished post-socialist transition, parenthood is not supported adequately by relevant institutions. The burden of parenthood is predominantly put on women's shoulders. Whether they are employed or not, women/mothers are the primary caregivers, while the typical Serbian family can be described as a male breadwinner model. Recently, minor adjustments in mother's and father's parental activities have been acknowledged, but they are the exception rather than the rule. The current Serbian gender regime still reproduces significant gender gaps in employment, wages, time management, caregiving practices, domestic unpaid work, and public engagement/power relations.

For the last two decades, Serbian family policies have gone through several changes in accordance with contemporary trends and changes in family life, and also influenced by EU regulations and recommendations. Current legislation is in line with the gender equality principle, enabling both parents to exercise their rights. However, when it comes to paid parental leave, the Serbian legal framework is considered inflexible in terms of choosing the combination of length of leave and the remuneration amount. Welfare state redistribution towards mothers via paid parental leave is significant, as mothers make up the majority beneficiaries. Arguably, the "cultural component that governs the (gendered) division of market and non-market activities within the family actively delays the effects of the reforms" (Farré, 2016: 57). Current population policy, elaborated in the national *Strategy of encouraging childbirth* (Vlada RS, 2018), is mainly focused on financial incentives. Clearly, contemporary policy measures do not generate the expected results – thus, researchers "recommend that population policies focus on strengthening human resources" (Vuković, 2022: 57).

In the last decade, the EU and individual member states have introduced or expanded paid parental leave measures to encourage the uptake of the leave amongst fathers. Motivations behind such policies include reducing the gender gaps in both private and public social arena. According to Farré (2016: 57), "parental leave exclusively reserved for fathers and non-transferable to mothers are presented as a useful policy instrument to alter the gender-specialization home production model and increase women's opportunities in the workplace". The recent EU Work-Life Balance Directive (2019) aims to reduce gendered labour market inequalities and the female pension gap (van Belle, 2016). Moreover, the EU expanded the paid parental leave policy aiming to improve conditions for parents to achieve the desired number of children. Expanded paid parental leave policy potentially also benefits the employers as it helps them to attract or retain good workers/experts; it improves employees' morale and thus their efficiency and have a positive impact on their health and well-being. In order to increase the number of fathers taking paternity leave and improve gender balance in taking parental leave (both in Serbia and EU countries), several measures might be installed, such as: high(er) income replacement rates[13], individual entitlement of the right ("use-it or lose-it basis"), and "appropriately timed leave around the time of birth or linked to the mother's return to employment" (van Belle, 2016: 9).

The integration of the gender mainstreaming principle implies creation and implementation of family-friendly policies providing major assets for the parents to harmonize work and family life. Additional measures of family-friendly policies (e.g. campaigns that promote fathers' involvement in childcare) could openly advocate a positive image of new fatherhood and shared parenting aiming to transform gender-imbalanced cultural patterns and ideologies, both in public and private discourses. This is of particular importance in societies with (semi)traditional gender regimes. As Farré (2016) stated: with more countries modifying their family policies, there will be more opportunities to evaluate the outcomes of newly applied measures on gender equality.

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[13] The compensation rate during parental leave varies from very low (10-25%, e.g. Hungary) up to 100% of earnings (Spain, Croatia), with the average rate of 50%. Some EU members provide flat rate allowances (e.g. Slovakia); in some countries, amount of compensation is determined by duration of the leave (e.g. Poland, Sweden) and in some, it depends on the amount of other social compensations (e.g. Luxemburg). (https://ec.europa.eu/social/home.jsp?langId=en).

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STUDIA UBB SOCIOLOGIA, 69 (LXIX), 1, 2024, pp. 131-151
DOI: 10.2478/subbs-2024-0005

OUR EVERYDAY FOOD AND CONSUMER BEHAVIOUR

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ABSTRACT. This study explores the relationship between food labelling and consumer behaviour, with the primary aim of identifying the factors influencing food choices and evaluating the impact of education level and gender on the consultation of labels. The methodology involved data collection through a questionnaire distributed on Facebook, ensuring a varied geographic and demographic coverage. The results revealed significant differences in food choice behaviour influenced by area of residence and gender, with important criteria such as price and packaging appearance. A significant association was found between education level and the criteria for selecting products, and no notable differences were identified in label consultation between men and women. Contrary to the formulated hypothesis, there was no evidence that the level of education leads to significant difficulties in understanding label information. The study contributes to a deeper understanding of the factors influencing consumer behaviour in the food sector, although limitations related to the online data collection method and sample size may affect the generalisability of the results. Future research could benefit from a larger sample and additional methods to gain more comprehensive and precise insights.

Keywords: food, label, package, consumer, expiration date.

Introduction

Food labels hold a particularly important role for both consumers and producers, being directly connected to the safety and quality of food. Consumers are increasingly attentive to details such as how products are manufactured,

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their nutritional value, and the impact of diet on health, especially in relation to obesity. Moreover, they are interested in global efforts to reduce food waste and promote sustainability.

Producers and other participants in the supply chain, such as distributors and retailers, can use food labels to communicate effectively with consumers. Through these labels, they have the opportunity to present their products in a unique way, highlighting their distinctive qualities and setting themselves apart from other brands on the market. Labels offer an excellent opportunity to emphasize the superior quality of products, which can more easily capture consumers' attention and foster customer loyalty, thereby contributing to the creation of a lasting competitive advantage in the long term (Iancu and Nedelea, 2018: 70).

Obesity has become a major public health concern for governments around the world. One approach that has gained notoriety in recent years to help reduce the global obesity epidemic is the use of nutrition labelling. As scientific evidence on the link between obesity and associated chronic diseases has grown, the World Health Organization (WHO) has strongly advocated the use of nutrition labelling schemes and the provision of nutrition information as key strategies to improve healthy food choices (Araya et al., 2021: 2).

In line with WHO recommendations, many countries have required food suppliers to disclose information on caloric and nutritional content. However, a potential disadvantage of this approach is that consumers may misunderstand or use nutrition information incorrectly, preventing effective communication. To overcome this problem, some retailers have voluntarily provided simplified information about healthy products to persuade interested customers to improve their food choices at the point of sale. More countries tend to adopt simplified mandatory front-of-pack labelling, focusing on unhealthy products, to change consumer behaviour (Araya et al., 2021: 2).

Due to disputes arising in the food industry and the influence of social media, as well as due to the discovery of an increasingly pronounced link between the products consumed and the state of health, the consumer is becoming more attentive and informed when making decisions regarding the purchase of food. A significant factor in guiding successful food choices is the nutritional information provided on the label. Thus, the consumer aims to analyse and understand this information (Grigoraș, 2017: 19).

Consumer behaviour refers to a process by which the individual responds to a need. This process involves both cognitive phases (decisions) and action phases (purchase and actual consumption). A clear distinction is made between consumption and purchasing behaviour. Buying behaviour focuses on the actions that the consumer takes when deciding to buy a product. In contrast, consumption behaviour includes actions related to product use, consumption, and subsequent disposal of the product or related services (Tincu, 2009: 212).

The American Marketing Association defines consumer behaviour as an interaction between impressions and perceptions, behaviour and everyday natural events, through which people manage changes in their lives (Peter, 2010: 5). This definition emphasizes the existence of fundamental processes that must be considered in the formulation of consumer behaviour, namely: perception, information and learning process, attitude, motivation and actual behaviour (Remeșovschi, 2018: 55).

Consumer behaviour can be thus described as the set of all decision-making actions taken at the individual or group level, directly related to the purchase and use of goods and services to satisfy current and future needs. This includes the decision-making processes that precede and influence these actions (Morariu and Pizmaș, 2001: 5).

A key element that can influence consumer behaviour, particularly when it comes to food choices, is the product label. For many shoppers who are unfamiliar with the technical details of the food industry, interpreting labels can be challenging. Whether it is the order in which ingredients are listed or the small print, such information can be difficult to decipher. While consumers appreciate the presence of both the label and the nutritional table on packaging, the level of trust in the accuracy of this information varies significantly. Confidence in the information provided on labels is built through repeated positive experiences with the products in question, but it can quickly diminish if even a few negative incidents arise that cast doubt on the reliability of the data. Clear and consistent communication is therefore crucial to maintaining consumer trust over the long term (Iancu and Nedelea, 2018: 71).

In Romania, Regulation 1169/2011 on the food products labelling includes specific regulations, formulated in negative terms, establishing what the labelling must not contain: must not mislead the buyer, attribute to the food products properties to prevent, treat or cure human diseases, nor suggest such properties. These prohibitions and restrictions also apply to the presentation of food products, including the shape, appearance of the packaging and packaging material used, the way of presentation, the environment in which they are displayed and their advertising (Nuță and Moldoveanu, 2016: 30).

Complying with legal requirements for the correct labelling of food products has a significant impact on consumers and their eating habits. It protects consumers from unfair and misleading practices, such as food adulteration. Labels provide crucial information regarding product ingredients and nutritional claims, allowing consumers to make more informed choices. For instance, a product high in saturated fatty acids may indicate the need to limit consumption, whereas a product rich in monounsaturated and polyunsaturated fatty acids might be favoured for its potential health benefits. Educating, especially children, about reading labels correctly can help make healthier food choices and reduce the incidence of diet-related diseases such as obesity (Nuță and Moldoveanu, 2016: 30).

Food labelling serves as a means of communication that reflects the quality of the ingredients, so that consumers are sure that the products purchased correspond to their wants and needs (Asp and Bryngelsson, 2008). When accurate and clear, food labels can inform consumers about the origin of products, the production methods used or their nutritional content. This information can help consumers make healthy, green and socially responsible choices by giving them the opportunity to 'vote with their forks', i.e. make informed purchasing decisions that better match their values (Howard and Allen, 2010: 247).

In the case of food products, in Romania, the label must contain the following information: the exact name of the food product, the complete list of ingredients and their quantity, the net weight of the product, the expiration date or the period of validity, the optimal storage conditions and use, manufacturer's name and address, production batch number, and for alcoholic beverages, the alcohol concentration must be specified. Imported products must have a label in Romanian and, in addition to the previously mentioned information, must also include the name and address of the importer or distributor registered in Romania, as well as the country of origin (Meijer et al., 2021: 48).

Previous studies on the Romanian population have focused especially on awareness and understanding of food labels. For example, Festila, Chrysochou, and Krystallis (2014) investigated Romanians' perceptions on 11 most used food labels, regarding their awareness, usefulness, understanding and trust. Results showed that Romanians had at that time a low level of awareness of food labels, except for Guideline Daily Amount label, and reported an average level of trust, understanding and usefulness in what concerns food labelling.

Georgescu et al. (2016) analysed the understanding of food labels on a sample of 504 residents from the city of Sibiu. 54% of the respondents expressed mistrust on food labels, price and brand were the most important criteria for buying a product, country of origin of the producer was significant for 63% of the sample, and the expiration date for 76% of the consumers.

In a recent study, Avram et al. (2022) investigated awareness and understanding of food labels of Romanian consumers, with a specific focus on food additives mentioned by the labels. The authors correlated the answers with variables such as frequency of going shopping, level of education, gender, income and residence area, and found that education, income and frequency of purchasing food are important factors that influence consumers' behaviour.

Unlike previous studies that focused on the attitudes of Romanian consumers, this research evaluates the influence of several socio-demographic variables (such as the level of education, area of residence and gender) on consumption habits and label consultation. Also, the methodology used, which included the distribution of a questionnaire through social networks, allowed for a more geographically diverse sample, which provides a more comprehensive representation of the population. Another innovative aspect consists in testing the hypotheses related to the association between the level of education and the difficulties encountered in understanding the information on the labels. Unlike previous studies, which generally looked at consumer perception, we directly assessed interpretation difficulties and found that there was no significant association between the level of education and challenges in understanding labels, thus providing a new perspective in the field.

Methodology

This study aimed, through a cross-sectional approach, to investigate the relationship between food labelling and consumer behaviour. The study set four objectives:

Ob. 1. To investigate the factors that influence the eating behaviour of consumers.

Ob. 2. To analyse the relationship between the level of education of consumers and their decision in choosing a product.

Ob. 3. To determine the relationship between the level of education and the degree of familiarity with the content of food labels.

Ob. 4. To analyse whether the consumer's gender influences the consultation of food labels before purchasing a product.

The following hypotheses were considered during the investigation:

H1. There is an association between gender, area of residence (rural/urban) and the criteria for choosing food products.

H2. There is an association between the level of education and the factors that determine the choice of a food product.

H3. People with a lower level of education have more difficulty understanding the information on food labels.

H4. Women consult food labels more frequently than men before purchasing a product.

Data were collected between April-June 2024, on the Facebook platform, where a questionnaire with 15 items was distributed, using the demographic targeting functionality of the platform, to participants from various localities and social settings, thus ensuring a wide geographic and demographic coverage. Inviting users to complete the questionnaire was voluntary and anonymous, clearly explaining the purpose of the study and the use of the data for strictly research purposes. This distribution method on Facebook facilitated obtaining a heterogeneous convenience sample for the analysis. The data analysis was conducted using SPSS, version 25.

Limitations

There were some limitations and difficulties encountered during our data collection and research. The participation and response rates varied considerably, which affected the homogeneity of the sample. In addition, the correctness of the responses may be influenced by interpretation errors or social reactions. Another issue was geographical representativeness, as Facebook is used differently in different regions. Internet access was another limitation, as participants needed Internet access and an active account on Facebook to complete the questionnaire. In addition, the self-report method used for data collection introduced a potential bias because responses are based on individual perceptions and memories, and might not reflect the objective reality of the consumer behaviour. Another important limitation of our study is related to the small dimension of the convenience sample we used for our analysis, that does not allow generalisations for the entire Romanian population. These aspects must be considered in the interpretation and application of the study results.

Results

The respondents' sample for this study consists of 108 participants, with the following demographic characteristics:

Table 1. Socio-demographic features of the sample

Category	Subcategory	Number of Respondents	Percentage
Age Group	18-30	62	57.4
	30-45	16	14.8
	45-60	24	22.2
	+60	6	5.6
Gender	Male	44	40.7
	Female	64	59.3
Area of residence	Urban	80	74.1
	Rural	28	25.9
Education Level	Tertiary education	89	82.4
	Secondary education	19	17.6

As it can be seen, regarding the age category, the best represented is the 18-30-year-old group, with a number of 62 respondents (57.4%). Thus, our results mostly reflect the perceptions of young people. Regarding the gender variable, the majority of respondents were women (64 respondents, representing 59.3%). Most of our respondents come from the urban environment (80 people - 74.1%) and are graduates of tertiary education (post-high school or university) (89 respondents - 82.4%). A possible explanation for this situation is the convenience sampling and the method of distributing the questionnaire on social media using the snowball method.

One of the factors we consider that influences consumers' behaviour in matters of food choice is age. According to previous studies, young individuals are often influenced by dietary trends and social media, which can affect their food preferences and purchasing decisions (Patwardhan, Mallya, and Kumar, 2024; Rounsefell et al., 2020; Friedman et al., 2022). Investigating their eating behaviour can provide valuable insights into the increasing consumption of fast food and processed products, as well as ways in which food education can be improved to promote healthier choices. In contrast, older individuals frequently exhibit greater concern for health and the impact of diet on chronic diseases (Mao et al., 2024; Kizil et al., 2020). Their eating behaviour may reflect preferences for more natural products, with a reduced content of additives or preservatives. Understanding how these consumers make decisions can help to adapt food offerings and develop marketing messages that better meet their needs and preferences. The data obtained from these age groups are essential for the development of public health policies and marketing strategies in the food industry. They provide a solid foundation for promoting healthier food choices and for continuing nutrition education, thereby contributing to the improvement of public health and the reduction of diseases associated with unhealthy diets, such as obesity and cardiovascular conditions.

In order to investigate whether age is as a factor influencing consumers' behaviour, we conducted several Crosstab analysis, verifying the association between age and the following variables: the criteria for choosing a food product (commercials, ingredients, packaging, producer, expiry date, price, labelling); the frequency of reading food labels; the degree of familiarity with the content of food labels; the main aspects of interest when reading a food label (origin of the product, ingredients, nutritional declaration, expiry date, ecological certification, allergens).

Figure 1. Criteria for choosing food products

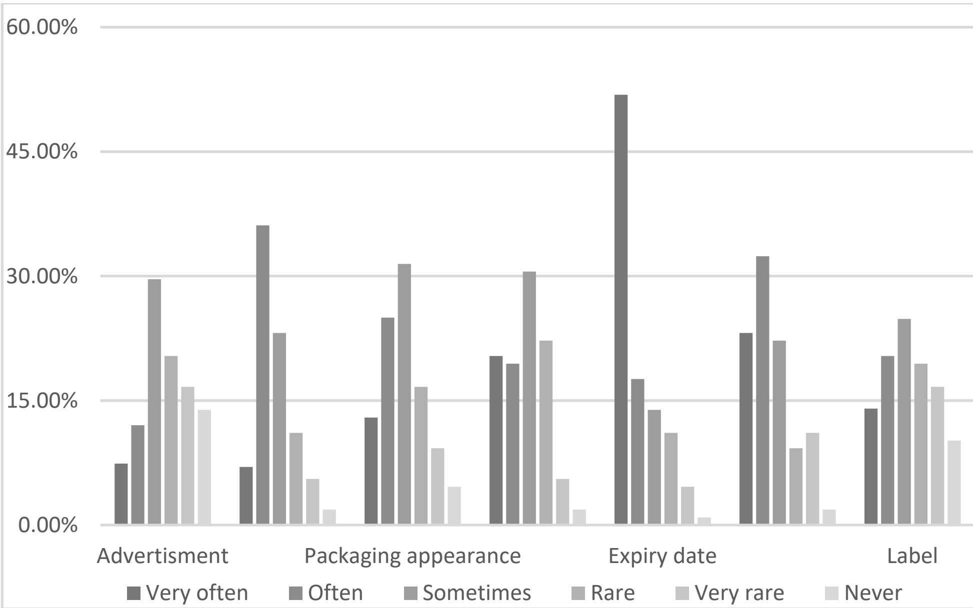


Table 2. Frequency of consulting criteria for choosing food products

Frequency of consulting	Advertisement	Ingredients	Packaging appearance	Price	Expiry date	Producer	Label
Very often	7.40%	7%	12.96%	23.14%	51.85%	20.37%	14.04%
Often	12.03%	36.11%	25.00%	32.40%	17.59%	19.44%	20.37%
Sometimes	29.62%	23.14%	31.48%	22.22%	13.88%	30.55%	24.84%
Rare	20.37%	11.11%	16.66%	9.25%	11.11%	22.22%	19.44%
Very rare	16.66%	5.55%	9.25%	11.11%	4.62%	5.55%	16.66%
Never	13.88%	1.85%	4.62%	1.85%	0.92%	1.85%	10.18%

Before proceeding with the statistical analysis, we should mention that the degree of familiarity with the content of the food labels has not been objectively measured, using a certain scale. The analysis will consider the self-perceived level of familiarity of the respondents, which might represent a limitation.

For the first Crosstab, we associated age with the criteria for choosing a food product (commercials, ingredients, packaging, producer, expiry date, price, labelling).

According to the frequency analysis, most often consumers are interested in checking the expiry date of the products (69.44% answered “often” and “very often”), the price (55.54%) and the producer (39.81%), and less preoccupied by advertisement (19.43).

From the Crosstabs analysis we notice the following:

Table 3. Association between age and criteria for choosing a food product

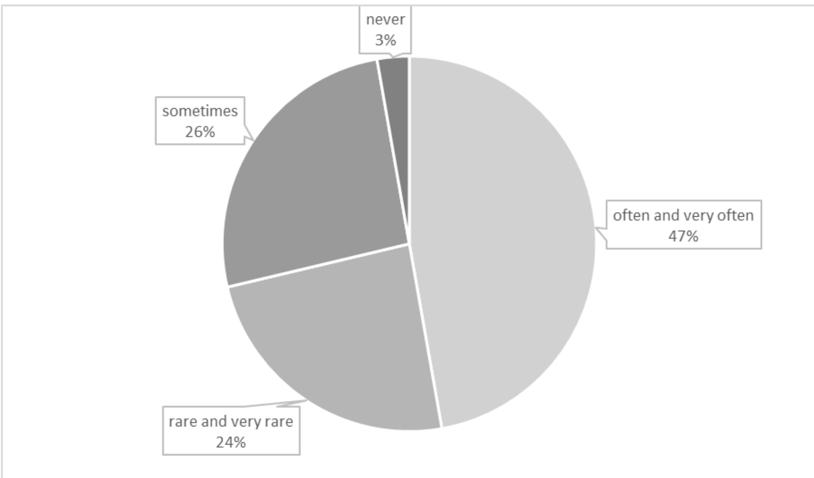
Criterion	Pearson Chi-Square Value	df	Asymptotic significance (2-sided)
commercials	31.277	15	.008
ingredients	14.202	15	.510
packaging	17.970	15	.264
producer	13.450	15	.568
expiring date	15.660	15	.405
price	35.696	15	.002
labelling	23.856	15	.068

Even though the price was the second most relevant criterion for choosing a food product, and the commercials the last in the preferences of the costumers, the results of the Chi-square test reveal a statistically significant association between respondents' age and the frequency with which they consider price ($\chi^2(15)=35.696$, $p=.002$) and commercials ($\chi^2(15)=31.277$, $p=.008$) as important criteria in food product selection. There are no statistically significant associations between age and ingredients, packaging, producer, expiring date or labelling.

The Linear-by-Linear Association analysis indicates a significant trend ($p=.001$), suggesting the existence of a linear relationship between age and the emphasis placed on price. This finding implies that, as respondents' age increases or decreases, there is a consistent shift in the extent to which price influences purchasing decisions. For young people the high sensitivity to price is possibly due to limited financial resources or a greater emphasis on budgeting and saving, while for older individuals (+60 years) potentially due to pension management and budgetary constraints.

The Linear-by-Linear Association analysis also demonstrates a significant trend ($p=.039$), suggesting the presence of a linear relationship between age and the emphasis placed on commercials. Young adults may have a high susceptibility to advertising, potentially due to greater exposure to digital and social media marketing, or a stronger interest in promotional content, while older individuals (+60 years) appear to be less influenced by advertisements. This suggests that they are more likely to rely on prior experience, word-of-mouth recommendations, or personal preferences when selecting food products.

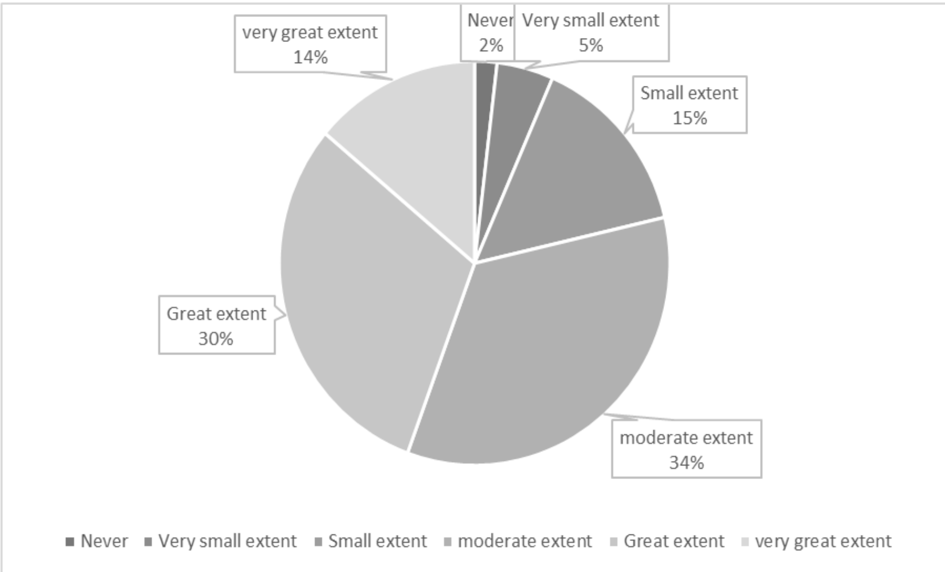
Figure 2. Frequency of Reading Food Labels Before Purchasing a Product



A second Crosstab test we performed for analysing the importance of age as a factor that influences consumer behaviour considered the frequency of reading food labels. 47,22% of respondents often and very often consult the information on the food label before purchasing a product, an aspect that we appreciate as positive. According to the Crosstabs test ($\chi^2(15)=15.923$, $p=.387$), there is no association between age and the frequency of reading food labels.

As for the association between age and the degree of familiarity with the content of food labels, the Crosstabs test shows no significant association ($\chi^2(15)=21.900$, $p=.110$).

Figure 3. Consumers' Familiarity with the Content of Food Labels



When selecting food products consumers place the greatest emphasis on the expiration date, ingredients, and the product origin. The expiration date is frequently scrutinised, indicating a heightened concern for food safety, while ingredients are carefully examined, reflecting an interest in maintaining a healthy diet. These findings underscore a growing consumer preference for informed choices, grounded in label transparency and considerations of health and safety.

Table 4. The main aspects of interest on food product labels

Aspect of Interest	Number of Responses	Percentage (%)
Nutritional information	36	33.3%
Ingredients	76	70.4%
Allergens	23	21.3%
Expiry date	94	87.0%
Product origin	56	51.9%
Ecological/sustainable certifications	19	17.6%
Organic/bio product	20	18.7%

The association tests highlighted the existence of a significant statistical association only between the age variable and the nutritional declaration ($\chi^2(3)=14.728$, $p=.002$). This result suggests that certain age groups are more interested in the nutritional information on the label than others. For example, young people (18-30 years) seem less interested in the nutritional declaration, while adults and seniors are more attentive to this aspect. For all other criteria there is no significant association with age ($p>0.05$), which means that regardless of age, consumers tend to pay attention to these elements equally.

In conclusion, the Crosstabs tests have shown that there is an association between age and the criterion by which buyers choose a food product, regarding its price and under the influence of advertisements. No association could be identified between the age of the respondents and the frequency of reading food labels or the degree of familiarity with the content of food labels. Regarding the main aspects of interest when reading a food label, a significant association was registered only with regard to the nutritional declaration. We can therefore conclude that age is a factor that influences consumer behaviour, but only for certain selection criteria. Buying behaviour is more complex and can be influenced by other factors, such as education, gender or residential environment, factors that we will check further on.

To test if there is an association between gender, area of residence (rural/urban) and the criteria for choosing food products, which is also the first hypothesis of our research, we used the Chi-square test.

Table 5. Chi-Square Test

Gender:	Area of Residence		What criteria do you choose a food product by? (Label)	What criteria do you choose a food product by? (Expiry Date)	What criteria do you choose a food product by? (Packaging)	What criteria do you choose a food product by? (Ingredients)	What criteria do you choose a food product by? (Price)	What criteria do you choose a food product by? (Producer)	What criteria do you choose a food product by? (Advertiseme nt)
Female	Rural	Chi-Square	.500[a]	2.000[b]	3.333[c]	2.667[c]	3.000[a]	8.000[c]	1.333[a]
		df	4	2	3	3	4	3	4
		Asymp. Sig.	.974	.368	.343	.446	.558	.046	.856
	Urban	Chi-Square	7.566[d]	31.811[e]	17.528[d]	19.340[d]	6.151[e]	13.906[d]	9.604[d]
		df	5	4	5	5	4	5	5
		Asymp. Sig.	.182	.000	.004	.002	.188	.016	.087
Male	Rural	Chi-Square	1.706[f]	12.118[g]	5.941[f]	11.000[h]	3.294[g]	3.882[g]	2.706[g]
		df	5	4	5	3	4	4	4
		Asymp. Sig.	.888	.016	.312	.012	.510	.422	.608
	Urban	Chi-Square	2.857[i]	29.857[i]	8.000[i]	8.071[j]	10.214[j]	4.857[j]	3.714[i]
		df	5	5	5	4	4	4	5
		Asymp. Sig.	.722	.000	.156	.089	.037	.302	.591

The interpretation of the test shows that there are statistically significant associations between gender, area of residence and the criterion "producer" for female respondents, both in the rural (p=.046, p<0.05) and in the urban area of residence (p=.016, p<0.05). There are also statistically significant associations between gender, area of residence and the following criteria:

- "expiry date" (for female respondents in the urban area (p=.000, p<0.05) and for male respondents, both in rural (p=.016, p<0.05) and in urban area (p=.000, p<0.05);
- "packaging" (for female respondents in the urban area (p=.004, p<0.05);
- "ingredients" (for female respondents in the urban area (p=.002, p<0.05) and for male respondents in the rural area (p=.012, p<0.05);
- "price" (for male respondents in the urban area (p=.037, p<0.05)

In conclusion, female respondents from rural areas are influenced by the producer criterion, while female respondents from urban areas are influenced by the criteria of ingredients, expiration date, producer and packaging appearance. Male respondents from rural areas are influenced by the criteria of ingredients and expiry date, and those from urban areas by price and expiry date. The result indicates the existence of associations according to gender and the area of residence in the choice of the product due to some criteria, partially confirming the hypothesis.

The observed differences reflect not only the impact of socio-demographic factors but also how access to information and resources influences consumer behaviour. In urban environments, respondents come from both large cities—with greater exposure to product diversity and marketing campaigns—and smaller towns, where consumption habits are influenced by local economic and cultural factors. In rural areas, traditions and familiarity with certain producers play an essential role, while in urban areas, exposure to a wider variety of products leads to increased attention to label details and perceived product quality.

Thus, in accordance with the first objective of our research, that of investigating the factors that influence the eating behaviour of consumers, our study revealed age, gender and area of residence as factors that influence at a certain extent consumers' behaviour.

Another important factor that might influence consumer behaviour is education. According to the answers recorded by our respondents, we have grouped the variable education into two categories: tertiary education (89 respondents, representing 82.4%) and secondary education (19 respondents, representing 17.6%). In order to analyse the relationship between the level of education of consumers, the factors that influence their decision in choosing a product and the degree of familiarity with the content of food labels, we have formulated two hypotheses: H2. There is a significant association between the level of education and the factors that determine the choice of a food product and H3. People with a lower level of education have more difficulty understanding the information on food labels (according to the characteristics of our convenience sample, for the "lower level of education" we are referring to people with secondary education, due to the fact that there are no respondents with primary education in our sample).

To analyse the relationship between the level of education and the factors that determine the choice of a food product, we used Crosstabs and Chi-Square tests, that highlighted associations between the level of education and the following criteria: "price" ($\chi^2(10)=28.159$, p=.002); "packaging appearance" ($\chi^2(10)=42.214$, p=.000) and "ingredients" ($\chi^2(10)=19.339$, p=.036). Thus, the level of education influences the importance given to price, the list of ingredients and packaging when choosing a food product. These findings can be useful for marketing strategies and for customizing campaigns aimed at different educational groups. Also, this analysis highlights the importance of education in shaping food purchasing decisions. Future research could further explore this relationship to confirm how education influences decision-making processes.

A third objective approached in our study was to determine the relationship between the level of education and the degree of familiarity with the content of food labels. We have performed two Crosstabs tests that show that 50% of tertiary education respondents consult the labels' information often and very often, compared to 36% of secondary education respondents. Those with university education thus tend to consult the information on the labels more often compared to those with high school education. As for the degree of familiarity to the content of the food labels, 82.55% of tertiary education respondents have answered they are familiar and very familiar, compared to 63.15% of secondary education respondents. So we can conclude the level of education is a factor that influences consumer behaviour related to food labels.

Based on the results obtained from the statistical analysis of participants' responses to the question "Have you ever encountered difficulties in understanding the information on food labels?", it is evident that a significant proportion of respondents experience such difficulties at least occasionally. The most frequently selected response was "Sometimes", chosen by 34.3% of participants. Furthermore, a cumulative 32.4% reported encountering difficulties either "Often" (16.7%) or "Very often" (15.7%). This indicates that a total of 66.4% of respondents have faced challenges in understanding food labels at least occasionally ("Sometimes" or more frequently). These findings highlight that difficulties in comprehending food labels are widespread, affecting a considerable proportion of consumers. The frequency distribution suggests that only 13.9% of respondents reported never experiencing such difficulties, while the majority have encountered some degree of difficulty. Given this trend, it would be beneficial for food manufacturers and policymakers to consider enhancing the clarity and accessibility of information presented on food labels, ensuring that consumers can interpret and utilise this information more effectively.

We have assumed that people with a lower level of education have more difficulty understanding the information on food labels. To test this hypothesis, we conducted an ANOVA test. The hypothesis of homogeneity of variances is verified, according to the value of the Levene test ($p=.927$, $p>0.05$). From the ANOVA results, the sum of squares between groups (.902) is very small compared to the sum of squares within groups (166.088), suggesting that differences between groups are negligible. The mean square between groups (.451) is significantly lower than the mean square within groups (1.582), indicating that the variation between groups is comparable to the variation within groups. The F-statistic (.285) is low, and the p-value (.752) is considerably greater than 0.05, indicating no significant differences between the groups. There is no statistically significant difference between the groups regarding the difficulties encountered in understanding the information on food labels. This result suggests that, regardless of the group to which they belong (tertiary education or secondary education), respondents do not exhibit notable variations in their perception of the challenges associated with understanding food labels.

The final objective of our research was to analyse the influence of consumer gender on the frequency of consulting food labels before purchasing a product. To test the hypothesis that "Women consult food labels more frequently than men before purchasing a product," we employed the Mann-Whitney test to compare the statistical means recorded by the two respondent categories. It was observed that women obtained a mean rank of 52.23, while men recorded a mean rank of 57.81. This result suggests that, on average, men tend to consult the information on food labels slightly more frequently than women, although the difference is relatively small. In the comparative analysis using the Mann-Whitney test, the obtained U value was 1262.500, and the Z value was -.933. The p-value (Asymp. Sig. 2-tailed)=.351, which is greater than the significance threshold of 0.05. This result indicates that there is no statistically significant difference between women and men regarding the frequency of consulting food labels before purchasing a product. Therefore, although the data suggest a slight tendency for men to consult food labels more often than women, this difference is not considered statistically significant.

Discussions

A first idea highlighted after our study is that the main aspects that respondents look for on a food label are the expiry date (87%), ingredients (70.4%) and the origin of the product (51.9%). This is in line with the study of Alshukri, Elramli, and Albkoush (2020) and Riaz et al. (2022). Alshukri, Elramli, and Albkoush (2020) found that expiry date and country of origin are the main elements sought for on food labels by consumers in Libya. 70% of respondents from Tripoli municipality in Libya were paying attention to the expiry date, while 67.3% to the country of origin. Riaz et al. (2022) focused on female students from King Khalid University, Abha (Saudi Arabia), and found that 83.7% of the students were concerned with the expiry date. The research of Hoteit et al. (2022) showed that Lebanese population is mostly interested in the expiry date of the products (75.2%), followed by price (60.6%) and brand (50.5%). Ingredients scored fourth place on the options of the respondents (47%), followed by the country of origin (33.5%).

Another study result is that age, gender, education and area of residence are factors influencing consumer purchasing behaviour. The finding that consumers' behaviour is influenced by area of residence is in line with Chopera, Chagwena and Mushonga (2014: 580), who also highlighted differences between rural and urban respondents, concerning reasons for reading food labels, and most important sought information on labels or factors that influence buying a food product. While urban area respondents consider ingredients and date of expiry important on a food label, rural area respondents paid attention to weight or volume.

Education influences consumer perceptions and decisions to buy food products. Our study found associations between the level of education and food price, respectively packaging. The association between education and consumers' behaviour relative to responsible food products buying is also underlined by many studies, including Alshukri, Elramli, and Albkoush (2020), Jeruszka-Bielak et al. (2018), Christoph et al. (2018), Chopera, Chagwena and Mushonga (2014), Rashaideh et al. (2023), or Hoteit et al. (2022). In a previous study on 261 respondents from the city of Galati (Romania), Radu and Alexe (2018) found a positive correlation between the level of education and food labels' consulting and understanding of.

In our approach, no significant differences were found between tertiary and secondary education graduates in what concerns the difficulties in understanding food labels. 66.4% of respondents have faced challenges in understanding food labels at least occasionally, no matter their level of education. This is in line with Chopera, Chagwena and Mushonga (2014), who found that most consumers consider difficult to read the labels (40.9% mostly understand labels, and 51% only partial understand them), 80.6% of the respondents requesting for education on food labels. In the study of Alshukri, Elramli, and Albkoush (2020) 82% of the respondents claimed that the language used on food labels impedes to understand them. Language is also mentioned by Perumal et al. (2022) as a factor influencing food labels' understanding.

Our results imply that while men seem to check food labels slightly more frequently than women, this discrepancy is not large enough to be statistically significant. Previous studies, such as Chopera, Chagwena and Mushonga (2014), Bueno et al. (2022), Jeruszka-Bielak et al. (2018), Christoph et al. (2018), Hoteit et al. (2022), Rashaideh et al. (2023), or dos Santos et al. (2023), have highlighted that women are the one more frequently reading food labels. Zugravu et al. (2011) concluded, after a survey on 514 respondents from southern Romania, that women read food labels more frequently than men. A possible explanation for our results may be related to the limitation of our study in matter of sample size and diversity of sample, which could influence the results. Also, psychological, demographical characteristics or cultural background of the respondents may represent factors to influence their behaviour, idea sustained also by Hoteit et al. (2022). Future studies should consider a representative sample and also delve deeper into the factors affecting food label consultation and consider other variables like nutritional knowledge and health attitudes.

Conclusions

This research has contributed to understanding the factors that influence consumer behaviour in the food field. We have explored age, gender, education and the area of residence as factors that influence the consumer behaviour related to food and we observed that there is a relationship between age and price, commercials and nutritional declaration on the food labels. Another conclusion is that there is a statistical association between gender and area of residence, especially concerning the producer of food products (for women) and the expiry date (for men). Education influences the consumers' behaviour in relationship to price, ingredients and the packaging appearance. Tertiary education subjects read food labels more often than secondary education respondents, that explains the higher degree of familiarity with the food labels that tertiary education subjects report. No matter their level of education, our respondents claimed different degrees of difficulties in understanding food labels. As for differences between genders, our analysis did not show statistically significant differences between women and men regarding the frequency of consulting food labels.

It is important to note that the use of an online and limited convenience sample may influence the results and their generalizability.

For a deeper understanding of these behaviours, further analysis would be useful to explore additional variables such as income, occupation, and the frequency of exposure to healthy eating awareness campaigns. Moreover, expanding the sample would contribute to strengthening these conclusions and provide a better understanding of the factors that influence purchasing decisions in different socio-economic contexts.

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BABEŞ-BOLYAI

Sociologia

Faculty of Sociology and Social Work
"Babeş-Bolyai" University
ISSN (print): 1224-8703; ISSN (online): 2066-0464

Volume 69 / Number 1/ December 2024

CONTENTS

CLUJ UNIVERSITY PRESS
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