COMMENTARY

IN QUEST OF WELFARE. A COMPREHENSIVE COMMENTARY
(on Zamfir, Elena (coord.), II. Voicu, Mălina (coord.), III. Stănescu, Simona Maria (coord.), Politici sociale în România după 30 de ani. Așteptări și răspunsuri” (Social policies in Romania in the last 30 years. Expectations and Answers, Editura Academiei, 2020)

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“TOTAL WELFARE” – A DYNAMIZING ‘SOCIAL MYTH’

A government that eludes the outcomes of a periodical research on the state of society is condemned to rely on a voluntarist action. The publishing of monographs centred on the most pressing issues holds a clear strategic significance. We signal, in this context, the recent book edited by Prof. Dr. Elena Zamfir, Dr. habil. Malina Voicu and Dr. Simona Maria Stănescu. This is the third book in a series of the Research Institute for Quality of Life’s encyclopaedic monographs focused on the study of the quality of life and social policies in Romania in the last 30 years. The analytical model of this monograph is placed under the umbrella of the theory explaining societies impacted by the universal impulse to searching the ‘total welfare’, covering all the social categories and all the needs. The paradigm of the studies in this book is rooted in comprehending the relation between expectations (measured by the total welfare demands, i.e. welfare benefits claimants and unclaimed benefits) and answers (described by the social policies that commensurate the actual capacity to satisfy the welfare demand). A clarification is needed regarding the three categories of total welfare demands: those who claim and are entitled to welfare benefits, those who claim but are not entitled and those who would be entitled but did not claim. The studies in this multi-authored volume evaluate the full range of welfare claimants (elderly,

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3 Zamfir, Elena (coord.), II. Voicu, Mălina (coord.), III. Stănescu, Simona Maria (coord.), Politici sociale în România după 30 de ani. Așteptări și răspunsuri” (Social policies in Romania in the last 30 years. Expectations and Answers), Editura Academiei, 2020


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children, and other groups of people facing risks of living in poverty etc.) in relation with social policies. In Romania, the aggregate welfare demand is covered only at 60–70% of total, that is, of what we may design by the Marshallian concept of the “total welfare”. The idea of “total welfare” is an optimal parameter transposed into a normative target. Its nature is an idealistic one and is helpful to elaborate social policies for a given society. The concept was elaborated in the science of the economics, by Alfred Marshall in his approach on the “economic surplus” (the other name of Marshallian “total welfare” concept)\(^5\). In the economic perspective, the total welfare in a society is normatively reached if the consumers can purchase their needed products at a price that is less than what they are willing to pay, obtaining therefore a monetary gain, as Marshall argues. In certain societies this relation results in a deficit. This deficit must be covered by implementing appropriate social policies, which should realistically target it. As such, it is realistic to talk about a relative welfare. The methods used to measure the relation between total welfare and relative welfare represent the main contribution of the science of social quality of life. ‘Total welfare’ is, evidently, an imperative, a noble aspiration, a mobilizing ideal for generations united by the same desiderate: to have a better, dignified life. The research of such a phenomenon reveals the global race of societies moving on a path with many obstacles towards a moving target like a Morgana’s target (shape shifting target), a mixture of hope, realism, and imagination. Considering such an aspiration for a total welfare, a ‘relative welfare’ becomes intelligible, i.e., the welfare variation according to epochs, societies, and governmental concepts. The ‘total welfare’ rather looks like Sorel social myths when he refers to the infrastructure of strike action which rocked the nineteenth and the first half of the 20th centuries. The race for welfare borrows something from the historical specificity that Claude Levy-Strauss used to compare with the never-ending “run after a myth” only that in the context of the welfare quest it is about the social desiderate of ‘total welfare’. Within such a strain of society to attain and comprehend the welfare state, a new trend in research, centred on the issue of social welfare policies, appeared, and was affirmed. Abrahamson (1999) identified a substantial increase in the use of welfare state typologies. In the 1990s, welfare theory developments arrived at a critical theoretical juncture. Gough (2008) identified two methodological directions that have predominated over the ‘welfare modelling business’ (Abrahamson 1999). The first comprises a historical and institutional perspective (see Inglot (2008), Heclo (1974) and Weir, Orloff and Skocpol (1988)). The second consists of comparative analysis heavily slanted towards classifying welfare regimes. Esping-Andersen’s seminal work on the welfare capitalism (1990) marked the debut of a renovated ‘comparative social


policy research’ (Powell, Barrientos 2015). He focused his analysis on 18 OECD countries, ‘employing regression analysis in the context of linking policy and politics.’ (Barrientos 2014). In recent years, the Mediterranean group of welfare states has been added (Castles 1998). The developed ‘world’ of welfare regimes has been favoured although many developing countries being neglected in the literature (cf. Ebbinghaus 2012). Nevertheless, the theoretical discourse on welfare realities has been marked by incompleteness in terms of ‘composition, and number, of welfare state regimes’ (Bambra 2007)\textsuperscript{6}.

The quest of welfare is, as previously mentioned, a universal impulse, but we notice that not all the governments could pass this test. Some of them are regularly failing to find out the way that help societies to get access to social welfare and, consequently, leading to pockets of poverty and difficulties within such societies. We understand why the current studies focused on the quality of life and social policies must be grounded on longitudinal research. The monograph on social policies in the last 30 years, coordinated by prof. Elena Zamfir along with other two senior researchers, is enlightening on that type of research which combine the criteria of integrative analysis with longitudinal diagnose. Such research would have been impossible without the expertise of the Research Institute for Quality of Life (RIQL). The RIQL passed the test of equipollence with other similar institutions at European and international scale. The book is equally the reflection of such a longitudinal analysis and the expression of a performance on the institutionalized diagnosis of the quality of life and social policies in Romania.

THE INSTITUTIONALIZATION OF THE DIAGNOSIS OF QUALITY OF LIFE

The modern European societies create institutions called to periodically offer the mirror of collective life on which, as in America, the Reports on the State of Nations are issued. The European Foundation for the Improvement of Living and Working Conditions is famous for institutionalizing the tradition of longitudinal studies based on the EQLS model (European Quality of Life Survey). In Romania, the RIQL institutionalized the longitudinal studies on the diagnosis of quality of life, initiating the QLD (Quality of Life Diagnosis). Based on these studies of the RIQL as well as in the studies included in the above-mentioned monograph focused on social policies in Romania in the last three decades, we may comprehend the evolution of the quality of life in Romania. We may find the answer to some vital questions due to a longitudinal diagnosis realized by researchers and collaborators of the RIQL and published in the recent work\textsuperscript{7}


coordinated by prof. dr. Elena Zamfir. What is the state of the Romanian people in the third decade of transition? What is the combined answer of the state and of the communities to stringent issues like poverty and, consequently, to the recessive dynamic of the quality of life? The work published in 2020 is in some way rooted in the alarming conclusion signalled in the book published in 2013 (coordinated with the Italian scholar Filomena Magiono). During 16 years out of 23 of transition (which is the time interval of this diagnosis) the minimum daily basket was below the critical level of decent living, i.e., towards 75% rate of needs coverage as reflected in the decent consumer basket. We may call this phenomenon *biological stress* given that during this time the population has lived under the pressure of worries for daily bread and thus bearing a stressful collective mobilization for the biological perpetuation of the family. Two-thirds of the transition’s period was marked by such a biological stress. This is the context of the new monograph work published in 2020 and focused precisely on assessing the social response to such a terrible situation. Such a response equates with implementing social policies and these are precisely the area of utmost analytical concern in this paper. The book’s pivotal idea is that well-being depends on both the situation of human communities and on the profile of the welfare state. Communities are not passive in relation to the need for welfare and therefore social policies must assume not only the examination of the needs of the population but also the state of communities, *which can be likened to real welfare scorecard* with their own deficits that must be corrected by the social policy system. This is one of the four ideas that emerge from the spirit of most studies in the volume. Welfare policies are distinguished precisely by the degree of their proximity to communities. Referring to Esping-Anderson’s typology of welfare regimes, Dryzek (2008) underlines that “social-democratic welfare states (…) are better placed to handle the intersection of social policy and climate change than the more liberal market economies with more rudimentary welfare states” (Dryzek 2008, 340). Therefore, the two types of welfare regimes, the liberal one, based on the role of liberal market economies, and the social democratic one, based on a more extensive decommodification, induce two opposite types of social policies (see, for illustration, the chapter signed by Malina Voicu and Simona Stanescu on Esping Andersen’s typology).

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8 “During the period of analysis, 1989–2016, families with two minimum-wage workers, receiving child benefits for two minors (…) could cover [from this sources], towards 75% of the minimum decent.” (cf. Mihăilescu Adina, Pragurile de sărăcie (Poverty Lines) In: Enciclopedia calității vieții în România (Encyclopedia of Quality of Life in Romania), Editura Academiei, 2019, p. 374).

Social subspaces are revealed to us thanks to the analyzes contained in the RIQL’s monograph, under their significance as frames of community welfare scorecard10 through which disparities can be detected and localized. What gives these subspaces the profile of community welfare’s scorecard? The fact that the restoration of the welfare balance depends not only on the collective effort of the state but also on the community and the institutions involved in managing the transition processes. The issue is approached in the study on integrated social policies based on a dynamic equilibrium between the government models, lifestyle and community welfare (E. Zamfir) and in the study focused on the corrective role of social economy in relation with the market economy (see S. Cace 2020). The author argues that the social economy is the most appropriate level for ‘adjusting the most significant economic and social disequilibria’11. Generally, the research paradigm of the quality of life is focused on the community balances between needs and aspiration, necessities and resources, the dynamic of government and societal pressure, but also on the balance between resources, accessing/allocation strategies, and social inequality12 etc. The convergent action of all these factors capitalizes, in a positive or negative direction, the energy of society influencing the vital economy of a community.

A deficit of social policies, Dr. Elena Zamfir argues, and therefore an attitude of ignoring disadvantaged segments bring, at the scale of such segments, a decline in vital energies with adjacent effects such as loneliness, depression, cognitive decline, anxiety, and even heart diseases which signal a real contraction of wellbeing. Such recessive phenomena on the scale of large and small communities induce, the authors argue (see Elena Zamfir, Ştefan Cojocaru, Manuela Sofia Stânculescu, Monica Marin, Mariana Stanciu, Luminiţa Ionescu), lifestyles marked by social, psychological, material and social deprivation etc., thus overdetermining the contraction of welfare and generating the proliferation of defensive lifestyles etc.

All these recessive phenomena disempower the community well-being, induce, in other words, processes of degrading the quality of life on its material and spiritual side (well-being) (See Stânculescu, M. S. and Marin, M. on the imbalances in the relationship between the social policies and child protection in Romania). This study on the functionality of a community welfare scorecard for child protection

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11 Cf Daniel Popa și Sorin Cace, Economia socială în România…, p. 356.

12 As argued by Preotesi, M. Inechitatea socială ca produs al politicilor publice în domeniul fiscal și în cel al veniturilor în România postcomunistă (Social inequity as a product of public policies in the fiscal field and in the one of incomes in post-communist Romania) (In volume, op. cit. pp: 191–215).
and family service support was derived from a research study involving 10 countries. An illustration for a model of community welfare scorecard in the field of child protection is provided by the typology of Connolly et al. (2014), cited by the two authors, and based on the intersectionality of two dimensions: authoritarianism/permissivism, respectively, individualism/collectivism. The axial feature of a community welfare scorecard is its capability to control the relationship between the contraction and the expansion of welfare at the community level or of a population segment. The dynamic of this report staying within the limits set by what Steve Cole called, in the Marshallian tradition, “total welfare”.

Fatally, the contraction of welfare also generates a deterioration in the quality of health as an essential dimension of the quality of life, and thus affects the biosecurity of the population. It increases the frequency of phenomena such as hypertension, heart disease, obesity, drastic weakening of the immune system, anxiety, depression, cognitive decline, Alzheimer’s disease, and even premature death. And this massive degradation of the quality-of-life stems from the weakening of the community strength because people cannot live without community support and therefore outside of interdependencies and interactions with others and with the institutions called to assume the search for solutions. Steve Cole argues that “people haven’t evolved to live alone. We’re highly dependent on others from birth on. Humans aren’t like other animals. … Our survival and thriving depends on being part of a community. When we fall out of that sense of connection and community, our bodies respond to that as if we were literally threatened”14. Steve Cole calls for “total welfare” which is being reduced in community recessivity and therefore in the state of loneliness. “Loneliness not only feels bad, it may also be harmful to your health. People who feel lonely are at higher risk of many diseases. These include heart disease, high blood pressure, and Alzheimer’s disease. Loneliness may also increase the risk of death for older adults”15. The profile of the welfare state variation within a community in decline is confirmed by the fact that processes like abandonment of those in need and loneliness affect the population at any stage not just the elderly or families in difficulty (see Stanciu, M., Stanciu, L., idem). In other words, there are processes that holistically influence the social field which shows that the moral energy of a society, i.e, what specialists call spiritual wellbeing, depends decisively on the lifestyle vectors and, consequently, either lowers the vitality or raises it.

13 Stanculescu, M. S. and Marin, M. Evoluția sistemului de protecție a copilului în context internațional în România în ultimii 30 de ani (Evolution of the child protection system in the international context in Romania in the last 30 years Social policies in Romania in the last 30 years. Expectations and Answers), Editura Academiei, 20202020, pp. 250–259).
Therefore, the lifestyles, well-being (spiritual well-being), on segments, are all reflected in what Șt. Cojocaru defines by the quality of the parents, suggesting in this sense a parenting strategy. The moral performance of young people depends on the quality of parenting. Parenting develops in a person’s sociability, communication skills and therefore the vocation of communion. Lifestyle (E. Zamfir) and parenting (Șt. Cojocaru) seem to be the two crucial factors on which the spiritual well-being of the young generation depends. “Parenting styles”, argues Șt. Cojocaru, are a fundamental dimension of a welfare community scorecard. “Parenting styles based on responsibility, parental responsiveness and parental positive demandingness have a positive effect on the development of children’s emotional intelligence and the punitive discipline is correlated with a low level of emotional intelligence of children and teenagers mostly accompanied by negative behaviours like alcohol consumption, low self-esteem, lower school grades (Alegre 2011), deviant behaviour, depression, and anxiety etc. People often associate loneliness with getting older”\(^{16}\). “You can feel lonely at any age. A recent survey found that young Americans are more likely to feel lonely than older adults. Some research suggests that social media tools and resources are preventing younger people from connecting in real life, Cole says.”\(^{17}\) The definition of quality of life includes the referential to some elements of biological stress, which the longitudinal diagnosis of the RIQL includes analytically, obviously requiring a redefinition of social policies.

**THE SECULAR TREND OF THE BIOLOGICAL STRESS**

The longitudinal analysis carried out by research groups from the RIQL confirms this broaden definition evidencing the disturbing fact that in the last 100 years only about 40 were years of improving the standard of living whereas the rest of the period was marked by the biological stress. Therefore, we can argue that the century was under the sign of this kind of pressure. The interwar liberal period was followed by the Bolshevik “steamroller” infusing a new interval of biological stress for the Romanian people. A short period of relaxation in 1964–1978 (14 years) could be added to the 30 years of Romanian interwar period so that the beneficent time for the Romanians measures, across a century, about 40 years out of 100. Therefore, the wave of biological stress reverberates across two out of three generations (the proportion of trauma was 2/3). At the recent time scale, across three decades of transition, this proportion was reproduced almost at the same rate although slightly aggravated. The consequences of such a phenomenon were still

\(^{16}\) Cojocaru, St. p 261 (cf. *The need of a national policy for supporting parenting in Romania*, in volume, pp. 259–293).

insufficiently researched. Mircea Eliade spotted the recurrence of phenomena of threatening the collective existence on long term. He fit this recurrence into what he called the “terror of history”. Let’s now turn to the conclusions of the longitudinal studies of the RIQL regarding the evolution of the Romanians’ quality of life over one century within the geographical frame of Europe18.

THE MIRROR OF HISTORY. THE GAPS IN THE QUALITY OF LIFE AT DIFFERENT EPOCHS

The longitudinal diagnosis of the quality of life in Romania reveals a disturbing facet namely the chronic gap between West and East, between the Eastern Romanian and the Western European. In the 1870s, when the Western Europe was confronted with the Franco-Prussian War, the gap of the quality of life between the West and Romania was 4 to 1, similar to saying that a Westerner lives 4 to 6 times better than a Romanian. It is not hard to imagine the causes of the American pole of the European emigration. In 1913, when the life of the urban community in Romania was marked by arising leisure life, outdoor activities, visiting more tourist attractions in Sinaia etc., the gap decreases to the ratio of 3 to 1 comparing with the European Westerners’ quality of life, and 5 to 1 when comparing with the average American. It is the period of persistence of the lyrical humour of Caragiale’s short stories (1852–1912). In 1950 the gap returned to the ratio of 4 to 1 in favour of the European Westerner and 9 to 1 in favour of the American, Canadian and average Australian. The real leap forward in the quality of life of the average Romanian takes place around 1973 when the gap in the quality of life of the Romanian compared with the European Westerner had narrowed to the ratio of 2 to 1 and 3 to 1 when compared with the American. In the first 10 years of transition, as confirmed in the reviewed volume, the decline returned, so that in 2001, the Romanian lived, again, 3 times worse than the European Westerner and 4 times worse than the American, the Canadian and the Australian, exactly as in 1913. Longitudinal, i.e., during the 150 years since the two referential historical events, i.e. the Battle of Sedan and the Romanian War of Independence, the only interval in which the average Romanian managed to significantly reduce the gap in the quality of life compared to the Westerner was the interwar period and the one between 1964–1978. In 2017, the processes and reforms of the transition period brought the average Romanian back to the situation when the gap in the quality of life was of 4 to 1 compared to France and 5 to 1 compared to Sweden. Therefore, the transition took us back to the 1870s. (as shown in the data presented in the Encyclopedia of quality of life in Romania, published in 2019 by

18 Bogdan Voicu, Politici sociale postmoderne în România : între nevoie și schimbările așteptate ale sistemului de furnizare a bunăstării (Post-modern social policies in Romania – between needs and expected changes of the welfare supply system) (in volume, op. cit.: pp 59–83).
the Publishing House of the Romanian Academy, pp. 242–243). Acad. Catalin Zamfir’s recent studies on the transition period, the explanation of recessive dynamic is within four causes: the policy of destructive privatization, “small state” doctrine, political option of contracting the Romanian economy in favour of an ‘empty mondialism’, the rupture between political discourse and language of a country reality. The ‘real country’ and the ‘legal country’ stayed too long separately.19

FROM THE POVERTY OF VULNERABLE MINORITIES TO VERTICAL POVERTY

Finally, the studies of the RIQL, receiving confirmation of their highest quality by including them in the encyclopaedia coordinated by Prof. Dr. Elena Zamfir and collaborators, reveal that the poverty became permanent in Romania. It is unequivocal that the phenomenon of poverty is a permanency of universal history, but forms and severity of this phenomenon vary with epochs and peoples. The quasi-widespread form of poverty is that of vulnerable minorities and the RIQL’s diagnosis of quality of life started with the study of this form of poverty. Prof. Dr. Elena Zamfir’s studies are distinguished in this respect. In the tertiary phase of its studies, the RIQL insisted on the other form of poverty, which we ourselves researched. It's about vertical poverty. This is a structural poverty and affects the majorities, even the entire peoples. In the encyclopaedic volume on the quality of life as well as in the volume Social History of Romania, this phenomenon was examined from the perspective of the national and European gaps in the quality of life. “Vertical poverty is generated by structural inequalities, it is its price, paid by entire social segments in the form of vertical inequities induced by these inequalities. The structural inequalities (generating vertical inequities to the detriment of the peoples in the periphery of the modern world system) are “those between a small elite of very rich people and a large segment of the poor; those between a few large developed cities and the rest of the communities; between urban and rural; between large cities and small former mono-industrial cities; those between large developed villages and small, aged, peripheral villages; those between different regions of the country. … Thus, a stratification of life chances emerged … All these inequalities now seem deeply rooted, tend to be perpetuated and there is no evidence that they will be mitigated in the future »20. We will conclude that the entire activity of the Institute for the Quality of Life in


the 30 years, since its founding, shows us an institute at the age of its classicism, attested by the comprehensive refinement of methods, the balanced combination of perspectives, which makes it fit to move from the classical way of study involving the method of evaluating the daily needs to the scalar encyclopaedia enabled to include analyses of variable scale, in time and in space. All this reveals an institute that has already embarked on an exponential ascending trend, as the author of the SEDA method would argue.

THEORETICAL FOUNDATION OF SOCIAL POLICIES

An essential challenge of any social policy is how to get the resources for welfare state policies. The idea that a certain amount of money could by itself to influence the welfare state of a person or group of persons unveiled to be a myth. The great trouble with thesis of getting financial support for welfare social policies in the macroeconomic dynamic emerges from the law of perverse effect of any Keynesian intervention on the money wages within a given society. The prevailing thesis in the 1970s was that if you raise the rate of money wages, i.e. of inflation, you may get a decrease of unemployment, therefore an amelioration of welfare state.

The theoretical fundamental of this thesis was the Phillips’ curve. As a matter of fact, neither monetary policy nor fiscal policy could be used to stimulate economy and finally to lowering the unemployment rate. James Forder has promptly formulated the syntagm “Phillips curve myth”, therefore the idea that in the economy as a science, there arise the theoretical myth which dominate for a period of time the thought of economists. Forder has concluded that “Phillips curve myth was an invention of 1970s”. In the study dedicated to the historical regimes of welfare, the idea is that “the evolution of human societies decisively marks the development of contemporary ways of providing welfare”. The framework of the analysis is given by the “revised theories of modernity often referred to as theories of postmodernity, reflexive modernity, [theories] of the risk society (Beck 1997; Beck et al. 1994; Giddens 1991; Inglehart 2018; Inglehart, Welzel 2005; Lash 1999; Urry 2000)”, studies of authors in the field of social policy invoked in the

22 Preotesi, M. Inechitarea socială ca produs al politicilor publice în domeniul fiscal şi în cel al veniturilor în România postcomunistă (Social inequity as a product of public policies in the fiscal field and in the one of incomes in post-communist Romania) (In volume, op. cit. pp: 191–215)
24 (Bogdan Voicu, p 60).
same context (Fitzpatrick 1996; Hillyard, Watson 1996; Kemshall 2001; Leonard 1997; Mishra 2002; Noble 2004; Pease 2002; Pease, Fook 1999). The relationship between policies and models of social welfare provision and historical developments in various areas and eras becomes the central point of such a theoretical angle. In the studies dedicated to the phenomenon of poverty aggravation is enunciated the hypothesis of a historical relationship between the accumulation of deficits and "passively accepted state of helplessness and made addicted to a culture of poverty (Neculai 1996; Zamfir 1997; Stânculescu, Berevoescu, 2004)". The volume coordinated by prof. Elena Zamfir et al. excels in the character of a holistic monograph on the multidimensional relationships between quality of life and social policies. Such works illustrate the capacity of Romanian research to synchronize with the international models of this type of studies. Strategically speaking, this book has the moral and epistemological height of the well-known reports on the state of the nation periodically elaborated by the strategic research of the democratic nations of the world.

26 Zamfir, E. Spre o politică socială integrată în România postdecembristă: între aspirație și realitate (Towards an integrated social policy in Post-December Romania – between aspiration and reality) (In volume, op. cit. p: 43)