



# First European Quality of Life Survey: Quality of life in Bulgaria and Romania



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European Foundation for the Improvement of Living and Working Conditions

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# Foreword

Diversity is one of the defining features of the enlarged European Union. With the prospect of further enlargement ahead, differences such as those in living conditions, quality of life and cultural traditions are likely to be more pertinent than ever. While the nurturing of cultural diversity lies at the heart of the European ideal, fostering greater cohesion is also a central priority.

Against this background, the European Foundation for the Improvement of Living and Working Conditions has been committed to obtaining more in-depth information about how people live and how they perceive their circumstances. In 2003, the Foundation conducted fieldwork for its First European Quality of Life Survey in 28 countries: the EU25, the two acceding countries – Bulgaria and Romania – and one candidate country, Turkey. The survey was a questionnaire-based, representative household survey, which aimed to analyse how various life factors affect Europeans' quality of life. In particular, it addressed a number of key areas: employment, economic resources, housing and local environment, family and household structure, participation in the community, health and healthcare, knowledge/education and training.

The results of the Foundation's First European Quality of Life Survey were published in 2004. Since then, the Foundation has been engaged in more extensive analysis of how different aspects impact on individual quality of life in the EU. This activity has produced a series of in-depth analytical reports, which look at key components of quality of life across all 28 countries, identifying differences and similarities as well as policy implications.

This report examines quality of life from the unique perspective of the two acceding countries, Bulgaria and Romania. The historical, political, socioeconomic and cultural contexts of these two countries have meant that their experiences are often quite different to those of the EU Member States. In an attempt to identify the similarities and differences between these two countries and the EU25, the report explores key aspects of quality of life in Bulgaria and Romania, namely – their economic situation, housing and the local environment, employment, education and skills, household structure and family relations, work-life balance, health and healthcare, subjective well-being, and the perceived quality of society. As well as comparing quality of life indicators of the two acceding countries with the EU25 as a whole, the report also draws comparisons between the two countries and the six lower income EU Member States.

In light of Bulgaria and Romania's impending entry into the EU, this report is particularly timely in its efforts to underline the key challenges that lie ahead for ensuring these countries' proper integration in the EU. We hope that the findings of this report will contribute to shaping EU policies aimed at solving such issues and at improving quality of life for people living in Bulgaria and Romania and throughout the EU.

Jorma Karppinen  
Director

Willy Buschak  
Deputy Director

### **Country codes**

#### **EU25**

|    |                |
|----|----------------|
| AT | Austria        |
| BE | Belgium        |
| CZ | Czech Republic |
| CY | Cyprus         |
| DK | Denmark        |
| EE | Estonia        |
| FI | Finland        |
| FR | France         |
| DE | Germany        |
| EL | Greece         |
| HU | Hungary        |
| IE | Ireland        |
| IT | Italy          |
| LV | Latvia         |
| LT | Lithuania      |
| LU | Luxembourg     |
| MT | Malta          |
| NL | Netherlands    |
| PL | Poland         |
| PT | Portugal       |
| SK | Slovakia       |
| SI | Slovenia       |
| ES | Spain          |
| SE | Sweden         |
| UK | United Kingdom |

#### **Acceding countries**

|    |          |
|----|----------|
| BG | Bulgaria |
| RO | Romania  |

#### **Candidate countries**

|    |         |
|----|---------|
| TR | Turkey  |
| HR | Croatia |

### **Abbreviations**

|         |   |
|---------|---|
| EU6 Low | Six low-income EU Member States whose GDP per capita lies below 60% of the EU25 mean (see p. 8): Estonia, Hungary, Latvia, Lithuania, Poland and Slovakia |
| EQLS    | European Quality of Life Survey   |
| PPS     | Purchasing Power Standard   |
| EU15    | 15 EU Member States (pre May 2004)  |
| NMS     | 10 new Member States that joined the EU in May 2004   |
| EU25    | 25 EU Member States (post May 2004)   |
| GDP     | Gross Domestic Product  |

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# Introduction

Following enlargement in May 2004, the European Union is increasingly being characterised by a variety of economic, social and cultural differences among its Member States. Thus, an important focus of EU social and economic policy is to foster economic and social cohesion in order to reduce the inequalities that are currently visible across Europe, lowering the gap between older and new Member States with respect to living and working conditions. Further enlargement of the EU through the accession of Bulgaria and Romania, which is scheduled for 2007, will bring to the fore once again the issue of economic and social inequalities and the need for policies aimed at moderating differences, while still maintaining a positive overall trend of growth.

In order to reduce inequalities in an enlarged Europe, policymakers and social actors need reliable information on how people live and react to their living conditions. Against this background, the European Foundation for the Improvement of Living and Working Conditions launched the European Quality of Life Survey (EQLS) in 28 countries in 2003, examining key aspects of quality of life in the 25 EU Member States (EU25), the two acceding countries – Bulgaria and Romania – and one candidate country, Turkey. Since the Foundation published the results of this survey in 2004, it has been engaged in more in-depth analysis of key components of quality of life, based on the initial findings of the EQLS.

Among the series of analytical reports based on these findings, this report focuses on quality of life in the two acceding countries – Bulgaria and Romania. The report, which provides the first comprehensive analysis of quality of life in these two countries in a European context, explores both the objective living conditions of people in Bulgaria and Romania and their subjective well-being, along with people's perception of the society in which they live.

The main objectives of the report are to describe the material conditions and subjective well-being of people living in Bulgaria and Romania, and to identify the relationship between objective living conditions and subjective components of quality of life. Furthermore, the report compares the two countries from a number of quality of life dimensions, identifying areas in which the two countries are either similar or dissimilar in relation to eight major domains of quality of life and with regard to their economic, social, cultural and political integration in the EU. Moreover, the report places the situation of Bulgaria and Romania in a broader European context by comparing the results of these two countries with those of the six lower income and former communist new Member States (EU6 Low)<sup>1</sup> – Hungary, Poland, Slovakia, Latvia, Lithuania and Estonia – and also with the EU25 as a whole. Such comparisons help in assessing whether the two countries pose the same challenges for EU integration as the other former communist countries that joined the EU in 2004, or whether the accession of Bulgaria and Romania creates specific and new integration challenges for the EU.

Given the impending accession of Bulgaria and Romania to the EU, such a report is particularly timely. Although quality of life is not a criterion for accession, researching this sphere contributes to understanding the disparities in the various realms of people's lives and to identifying appropriate measures that are needed in order to achieve social cohesion at European level. Moreover, although the situation of Bulgaria and Romania has changed significantly over the last three years since the EQLS data were first collected in 2003, the comparisons between the two countries and between

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<sup>1</sup> EU6 Low refers to the six low income EU Member States whose gross domestic product (GDP) per capita lies below 60% of the EU15 average. This particular country grouping is adapted from a similar classification used by the Commission's Directorate General for Regional Policy in summarising inequalities in levels of economic development across EU Member States.

selected groups of EU Member States provide an interesting frame of reference for the continuing debate on EU enlargement.

### **Quality of life approach**

Quality of life is a key concept that has gained increasing influence in the field of social science in recent years. With its comprehensive perspective, quality of life takes into account the objective conditions in which people live along with individuals' subjective evaluation of the material resources that are available to them and their attitudes and perceptions regarding the quality of society.

Quality of life research also endeavours to gather valuable information and knowledge about the various realms of life and the way in which people respond to them during periods of social change. This approach can provide an important contribution to social policy, revealing the needs and deficits in various quality-of-life domains and highlighting the inequalities between social groups, which can be addressed through social development efforts (Mărginean, 2004).

The strengths of the quality-of-life approach (Fahey, Nolan and Whelan, 2003) lie in the following key attributes:

- Quality of life concentrates mainly on the life circumstances of individuals by employing a micro perspective. In order to shed light also on structural contexts, the data are complemented by information pertaining to the macro perspective regarding the situation at society level.
- Quality of life is a multi-dimensional concept and encompasses a range of life domains. As well as focusing on the description and explanation of the various realms of life, this approach also explores the relationship between domains such as: economic situation, employment, health and healthcare, family and households, education and training, community life and social participation.
- Quality of life is measured through the use of both subjective and objective indicators. In this way, it reflects both objective living conditions and subjective well-being, while emphasising the relationship between these two aspects. A distinctive feature of this approach is the insight it provides into the way in which people react to their objective circumstances and feel about their lives.

### **Quality of life and enlargement**

The strategy for an enlarged Europe encompasses two main challenges. The first concerns the goals of the Lisbon Strategy to make Europe 'the most competitive and dynamic knowledge-based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion'.

Lowering the gaps existing between older and new EU Member States with respect to the living and working conditions of citizens in these countries constitutes a second goal for an enlarged EU. Previous phases of EU enlargement increased the disparities between Member States in economic, social and cultural terms. Further enlargement through the entry of Bulgaria and Romania will bring to the fore even more the issue of inequality in economic and social realms and the subsequent policies that could contribute to reducing these differences, while maintaining a positive overall growth trend.

European social policy plays an important role in enabling people to improve the quality of their lives through enhancing economic and social cohesion. The new European social agenda (European Commission, 2005b) and European social policy aims at raising living standards and improving living and working conditions, strengthening social cohesion and combating exclusion, promoting equal opportunities, and safeguarding sustainability. Among the more concrete goals of this agenda are: promoting the 'knowledge society', achieving and maintaining high levels of social protection, promoting health and the accessibility of high-quality healthcare for all people, promoting participation and trust, reducing pollution, and strengthening families by taking into consideration new challenges in the field of childcare and care of elderly people (Fahey, Nolan and Whelan, 2003).

Together, these objectives are aimed at finding a solution to the problems currently being faced by European countries, such as high unemployment, the ageing population, the transformation of family structures, changes in economic gender roles, and environmental problems. The accession of Bulgaria and Romania is likely to add to these existing problems. Once they join the EU, Bulgaria and Romania will be among the poorest of the Member States; therefore, appropriate policies should be put in place to bring these countries closer to EU levels. During the past 16 years, Bulgaria and Romania have undergone difficult transformations as part of their transition to the market economy and a democratic political system. This process of change has been accompanied by a sharp economic decline, increased poverty and unemployment, and a higher level of corruption. In their efforts to come closer to the economic level of EU countries, Bulgaria and Romania will also have to invest more in social development and to try to solve the specific social problems they face. Currently, the low level of public spending in health, education and social protection is not conducive to social development. In addition, the two countries have to address specific issues in relation to their accession, such as combating corruption and introducing reforms of the justice system and of public administration, in order to ensure proper enforcement of the law (European Commission, 2005a).

## Outline of report

In its analysis of quality of life in Bulgaria and Romania, this report concentrates on eight key aspects of quality of life in these countries, six of them concerning objective conditions and the remaining two addressing the subjective dimension of quality of life.

Chapter 1 examines the economic situation of Bulgaria and Romania by focusing on income distribution and deprivation levels in these countries. Exploring the material conditions that characterise these two countries can reveal the main factors affecting people's standard of living.

Chapter 2 focuses on the quality of housing and the local environment in Bulgaria and Romania. Housing is an essential component of quality of life, which enables people to better organise their lives and to follow other goals that can help them reach their full potential. Thus, examining the quality of housing conditions and of the surrounding environment helps to provide a clearer insight into this important dimension of people's quality of life.

Employment, education and skills are the main focus of Chapter 3. Having a job is a crucial aspect of social inclusion and helps to protect individuals and households against poverty. A major European concern is creating more and better jobs; this is of even greater importance in low income countries like Bulgaria and Romania, where conditions are less favourable for citizens in comparison with more developed countries.

Family impacts heavily on quality of life as it represents a significant source of material, social and emotional support to its members. By analysing the structure of households and the roles performed within the family, Chapter 4 provides an insight into patterns of relations and responsibilities within families in Bulgaria and Romania.

Maintaining a balance between work and family life is also an important aspect of quality of life and has recently become a major policy concern at European level. The transition that has taken place in Bulgaria and Romania has affected people's work-life balance to a large extent, as the old models of working life have been disrupted in these countries. Chapter 5 explores the difficulties involved in harmonising work, family and social life in these two countries, along with the time constraints faced in relation to various activities.

Health is another key dimension of quality of life, as it is an important factor in determining people's ability to reach their goals. Chapter 6 examines the quality of healthcare services along with the accessibility of these services in an attempt to determine the standard of this important dimension of people's lives.

The way in which people evaluate their quality of life helps to provide an overall picture of the feelings that prevail at a certain moment in the different countries. Chapter 7 explores the subjective well-being of people living in Bulgaria and Romania by examining their assessment of the various components of their lives, as well as the factors contributing to the positive or negative feelings that people have about their own lives. These data complement the objective results outlined in the previous chapters of the report.

Assessing the level of trust that people have in each other, their perception of the tensions within society and of the quality of social services gives an insight into the perceived quality of life in a country. Chapter 8 explores this aspect of quality of life in Bulgaria and Romania. Finally, the report concludes with a summary of its main findings and places these findings in the context of the main policy areas of interest at European level at present.

## **European Quality of Life Survey**

The EQLS was carried out in 2003 by Intomart GfK in 28 countries: the EU25, the two acceding countries, Bulgaria and Romania, and the candidate country Turkey. In each country, a representative sample of people was gathered. Around 1,000 people aged 18 years and over were interviewed in the majority of countries, except for the smaller countries – Cyprus, Estonia, Luxembourg, Malta and Slovenia – where around 600 interviews were conducted. The questionnaire was developed by a research consortium and includes questions on a variety of life domains with an emphasis on employment and working conditions, housing, family, social and political participation, quality of society, and subjective well-being. The first processing of data was carried out by the Social Science Research Centre in Berlin (WZB). Several macro indicators were added in order to make possible links between individuals' self reports (e.g. household income) and the social situation of the country as a whole (e.g. GDP per capita) (Saraceno and Keck, 2004).

The EQLS represents the first large-scale attempt to explore quality of life in a broad range of countries, highlighting the challenges faced by the EU in the context of enlargement. Moreover, the

survey provides a unique opportunity to compare quality of life in European countries before and after accession, as a new wave of the EQLS is being planned for 2007. The survey creates an accurate picture of both the objective and subjective aspects of quality of life in an enlarged EU. Nonetheless, there are some limitations to the data (Saraceno and Keck, 2004). While the sample sizes of around 1,000 respondents per country provide a general population profile, they are too small to allow for a detailed analysis of sub-groups, such as immigrants or single-parent families. Moreover, even though the wide range of topics addressed in the survey represents a strong point, it also means that the data do not allow for an in-depth analysis of the topics. Some of the dimensions of quality of life are measured with a smaller set of indicators than is generally used in highly specialised surveys. However, the primary strength of the survey is that it provides an insight into the main aspects of quality of life, encompassing both objective and subjective aspects.

## Methodology

The data collection for the EQLS was organised by Intomart GfK, which designated national institutes to gather the random samples and conduct interviews in each country. Although the overall response rate was 58.4%, there was a large variation in national response rates, ranging from 30.3% in Spain to 91.2% in Germany. In Bulgaria, the response rate was 81%, while in Romania it was significantly lower, at 55.7%. After collection, the data were checked thoroughly by the Social Science Research Centre Berlin (*Wissenschaftszentrum Berlin für Sozialforschung, WZB*) with the help of national experts.

The analysis in this report attempts to describe and explain, where possible, the specific situation of Bulgaria and Romania in relation to the main aspects of quality of life. Comparisons are also made with the two other country groups: the six low income, former communist EU Member States – Estonia, Hungary, Latvia, Lithuania, Poland and Slovakia; and the EU25. Where appropriate, the data provided by the EQLS are complemented by data from the Eurobarometer, the European Values Survey and the European Labour Force Survey.

Data are displayed for all countries separately, where appropriate. Statistical values are only presented in the report if at least 30 cases are represented in the sample. Some categories, although important, were not included in the analyses due to the small number of cases (such as farmers, single parents, etc). The figures used in the analyses are population weighted. This procedure has been employed in previous reports of the Foundation and allows for an examination of the data at individual level.



Material conditions and standard of living are important determinants of quality of life. European social policy, as highlighted in a number of key documents (Social Protocol of the Maastricht Treaty in 1989; Articles 136 and 137 of the Amsterdam Treaty; the Lisbon Strategy), is currently concerned with the improvement of living standards and working conditions, and with the strengthening of cohesion and reduction of social exclusion.

In the context of EU enlargement, the concept of social cohesion has moved to the forefront of European policy. From a cross-country perspective, social cohesion relates to the reduction of inequalities between countries and regions of the EU, particularly in economic terms. In this respect, EU cohesion policy is facing significant challenges with respect to the integration of countries showing different levels of economic development. Social cohesion within countries concerns equality between individuals or households in relation to a number of life domains and is connected to social policy at national level. In their Joint Inclusion Memoranda,<sup>2</sup> Bulgaria and Romania have acknowledged the exclusion problems that they are facing and have developed measures aimed at targeting social exclusion.

The forthcoming integration of Bulgaria and Romania in the EU raises questions about the considerable differences in the objective economic conditions of countries across Europe. This chapter focuses on the economic situation, income and lifestyle of people living in Bulgaria and Romania, as well as placing it in a broader EU context. The chapter addresses three questions in particular: what are the current economic conditions of Bulgaria and Romania and to what extent do they differ from the six lower income EU countries and the EU25; what is the level of economic well-being among the different social groups in these two countries; and what challenges does the accession of Bulgaria and Romania pose for national and EU policies in the area of income and standard of living?

## Level of income

People's well-being strongly depends on the economic potential of the country in which they live and, in particular, on the level of national income generated and its distribution. Economic output measured by the level of gross domestic product (GDP) in purchasing power standards (PPS)<sup>3</sup> allows for a comparative analysis of the macroeconomic capacities of the individual countries in generating income. When analysing GDP levels in European countries, previous Foundation reports (Whelan and Maître, 2004) found significant differences between the 10 new Member States (NMS) and the older Member States (EU15), along with a considerable discrepancy in GDP levels among the new Member States; they also found that levels of GDP in Bulgaria and Romania were among the lowest.

During the initial years of economic transition, Bulgaria experienced two serious economic crises, which resulted in a sharp decrease in economic output, high inflation, widespread unemployment, and a decline in real household income. In the period 1990–1997, real GDP fell by about 30% and real household income even more substantially. However, in the eight years following this period, the

<sup>2</sup> The Joint Inclusion Memorandum (JIM) identifies and outlines the principal challenges which the EU candidate country faces in tackling poverty and social exclusion. The process of drafting the JIM has proved to be an important means of preparing candidate countries for full participation in the Open Method of Coordination on social inclusion.

<sup>3</sup> PPS is an artificial common currency where differences in price levels between countries have been eliminated through the use of purchasing power parities (PPP). The latter refers to currency conversion rates that convert currencies to a common currency, thus equalising the purchasing power of different currencies.

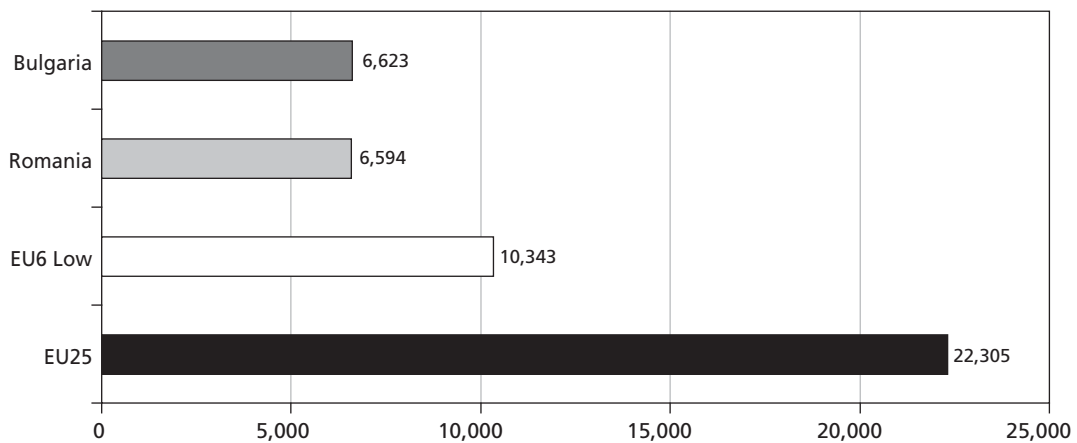


Bulgarian economy began to stabilise and subsequently make significant progress. In 2004, real GDP almost reached the pre-transition level and household income increased in real terms.

In Romania, the economic situation during transition was also marked by periods of economic crisis. As a result, by the end of the 1990s, real GDP was 20% lower than in 1990, while real household income declined even more considerably. During this period, the Romanian economy was marked by high inflation, significant job losses and an increase in unemployment. However, during the past five years, there have been greater signs of recovery. In 2004, real GDP reached the pre-transition level, although real household income still remained below the 1990 level. Generally, the macroeconomic development of Bulgaria and Romania in the years after the fall of communism has revealed similar trends. In both countries, particularly Bulgaria, economic deterioration was followed by a period of considerable stability and economic growth. Nonetheless, despite the progress in economic development, real household income in both countries still remained low.

Recent data on macroeconomic output show that Bulgaria and Romania have the lowest level of GDP per capita compared with the EU Member States (Figure 1). The difference in GDP levels is most pronounced when making a comparison with the EU25, with the level of GDP per capita in the two acceding countries being less than one third of the EU25 average (2003). There is also a considerable discrepancy between these two countries and the six lower income EU countries, with the average GDP level in Bulgaria and Romania being about two thirds of the average for the six EU countries.

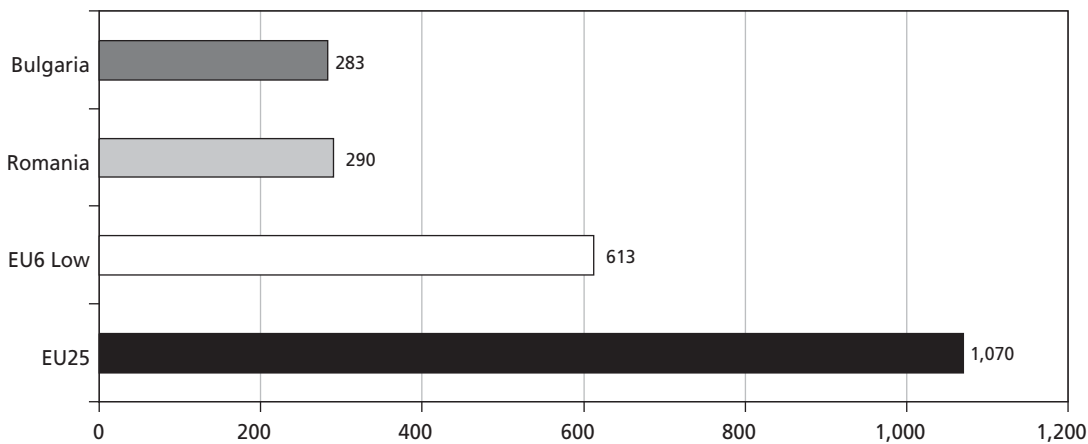
**Figure 1 Level of annual GDP per capita, by country group (€ PPS)**



Source: Eurostat, 2003

Eurostat provides information on household net monthly income (Statistics on Income and Living Conditions (SILC) statistics), based on household surveys in each country.<sup>4</sup> The income figures include all sources of income (monetary and income in kind) and are calculated in PPS in order to allow for a cross-country comparison.

<sup>4</sup> The purpose of the EQLS is not to collect independent estimates of income but rather to analyse various relationships involving income from a quality of life perspective. The comparison of Eurostat and EQLS data concerning household income reveals that, despite some differences in levels, there is overall consistency between them.

**Figure 2 Household net monthly income, by country group (€ PPS)**

Source: Eurostat, 2001

According to the Eurostat data (2001), Bulgaria and Romania have the lowest levels of household net monthly income among all of the 27 countries studied. The income levels of the two countries lag significantly behind the average income level of the six low income EU countries and even more considerably behind the average for the EU25. The low income levels of Bulgarian and Romanian households, in turn, generates poor living standard and creates financial problems in meeting essential household needs.

By comparing the macro (GDP per capita) and micro (household income) data between the two acceding countries and six low income EU countries, an interesting finding emerges. Bulgaria and Romania differ less from the six low income EU countries in relation to GDP per capita than they do with regard to household income. This finding is linked to the national income distribution mechanisms, which transform macroeconomic output into household income. These mechanisms seem to be less favourable in Bulgaria and Romania than they are in the six low income EU countries.

Differences are also visible between the two acceding countries in relation to income distribution patterns. In Bulgaria, the average income in the lowest income quartile (i.e. the quarter of the population with the lowest incomes in the country) in 2003 was €129 (PPS), while in Romania it was €115 (PPS). However, the average income in the top income quartile was considerably higher in Romania, at €639, compared with €518 in Bulgaria. This finding indicates the higher level of income inequality in Romania, where the average income in the highest income quartile is about 5.6 times higher than that in the lowest income quartile; in Bulgaria, the average income in the highest income quartile is four times higher than that in the lowest income quartile.

Given the generally low level of household income in both Bulgaria and Romania, particularly in the lowest income quartile, it is important to identify the population groups most at risk of falling into the poorest income group. This has particular relevance from a policy point of view.

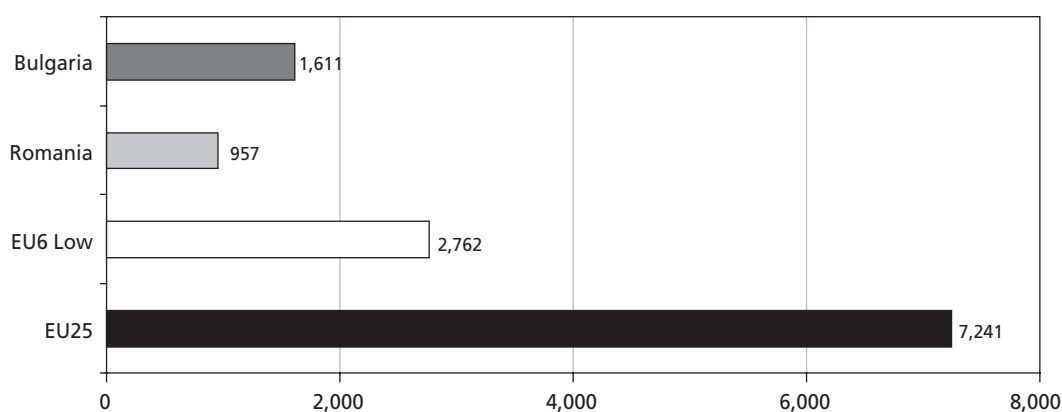
The EQLS data indicate that households with unemployed respondents in Bulgaria and Romania are under increased risk of poverty, with many of them (42% in Bulgaria and 56% in Romania) appearing in the bottom income quartile. Moreover, households with no working members (consisting of

inactive and retired people) constitute another risk group, with 39% of households in this category in Bulgaria and 55% in Romania appearing in the lowest income quartile. Households with only one working member are also at increased risk of poverty, since 42% of people in this category also appear in the lowest income quartile.

### Poverty levels

Eurostat defines relative poverty as income which is below a threshold of 60% of the median equivalised household net income.<sup>5</sup> Using available statistical information, it is possible to describe the differences in poverty levels and rates of poverty in Bulgaria, Romania and selected groups of EU countries.

**Figure 3 Poverty threshold, by country group (in € PPS)**



*Note:* Poverty threshold refers to 60% of the median equivalised household annual net income. With regard to the EU6 Low countries, data for Slovakia pertain to 2003 and data for Latvia pertain to 2002.

*Source:* Eurostat, 2001

Data for 2001 show wide variations in poverty thresholds not only between Bulgaria and Romania, but also between these two countries and the six low income EU countries (Figure 3). In Bulgaria and Romania, the poverty line is much lower compared with that of the two other country groups. In absolute (and real PPS) terms, this means that poverty levels in the two acceding countries are more extreme than those in the six low income EU countries and the EU25. The poverty line is particularly low in Romania. Since both acceding countries have a similar average level of household income, this suggests that income distribution in Romania is less equal than in Bulgaria, which implies that poor people in Romania are in a particularly unfavourable position – an issue that should be addressed in the country's national programmes and policies aimed at combating poverty.

When applying the abovementioned poverty line (relative poverty), the differences in rates of poverty between the two acceding countries and the selected country groups appear to be less pronounced. The proportion of people in relative poverty (those below 60% of the national median equivalised household net income) is similar in Bulgaria (16%) and Romania (17%), and does not differ greatly

<sup>5</sup> Equivalised total net income is calculated as the household total net income divided by the equivalised household size according to the modified OECD scale.

from the average figures for the six low income EU countries (17%) and the EU25 (15%). However, it should be mentioned that the concept of relative poverty does not provide a complete picture, as it only gives an indication of how many people have an income below the official poverty line; for example, it does not take into account the fact that in low income countries like Romania and Bulgaria, many individuals and households have incomes above the poverty threshold but are still disadvantaged and deprived of basic needs.

## Household deprivation

A household's economic well-being can be better described not only by assessing household income but also through the use of deprivation indicators as a more direct measure of living standards (Whelan et al, 2001; Russell and Whelan, 2004; Whelan and Maître, 2004). The concept of deprivation is based on people's assessment of the extent to which their household is deprived of basic needs. In the EQLS, respondents were asked whether the household possessed six essential items (food, clothing, adequate heating, furniture, social contacts, holidays) and if not, whether it was because they could not afford these items. Based on the respondents' answers, the deprivation index is calculated according to the average number of items that people are deprived of because they cannot afford them.

In accordance with the respondents' answers, Bulgaria stands out as having the highest level of deprivation among all of the 27 countries analysed, with Romania following closely behind (Figure 4). On average, Bulgarian households are deprived of about four items, which corresponds to the low level of household income in this country. Compared with the average deprivation index of the six low income EU countries, the deprivation index in Bulgaria is 56% higher. This gap is much greater when comparing Bulgaria with the EU25.

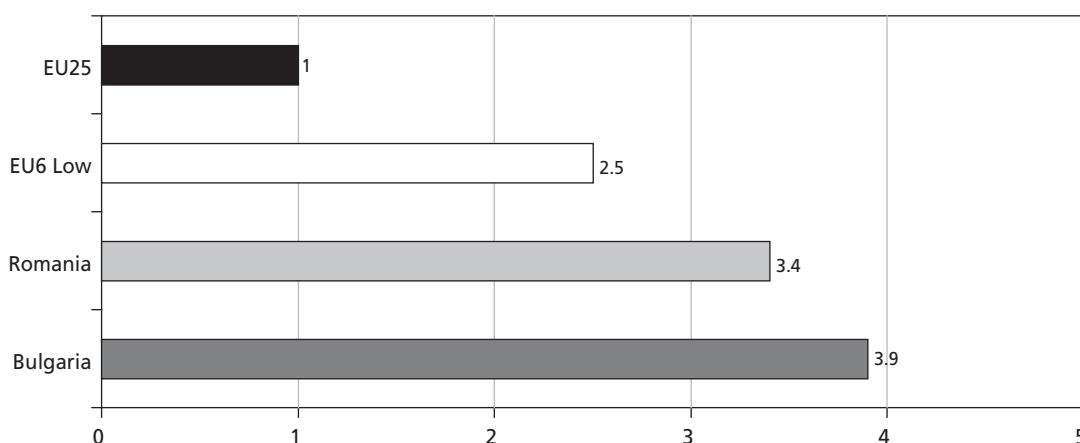
The average deprivation index for Romania suggests that households in this country are somewhat less deprived than those in Bulgaria. It is interesting to note that, although the level of household income in both countries is almost the same, Romania has lower levels of deprivation. This might be explained by the fact that a much higher proportion of people in Romania work in agriculture (30% compared with 10% in Bulgaria), which enables them to provide their own food and other forms of income in kind, such as clothing materials and wood for heating. This is particularly important for the 'income poor' in Romania, since their financial resources are much lower than those of people in the same category in Bulgaria (see Figure 3).

By focusing on the deprivation levels of different social groups within each country, it is possible to identify specific groups at increased risk of deprivation. In order to distinguish between categories of people facing material deprivation, an indicator of multiple deprivation has been constructed denoting a lack of at least two essential items out of the six items selected. Accordingly, a large proportion of Bulgarian (87%) and Romanian (80%) households are lacking at least two items, compared with the corresponding figures for the six low income EU countries (66%) and the EU25 (26%).

As expected, people on low incomes most frequently experience multiple deprivation. Almost all of the households in the lowest income quartile (97% in Bulgaria and 96% in Romania) could not afford two or more of the items. The corresponding figures are also extremely high among those in the

highest income quartile, at 83% in Bulgaria and 73% in Romania. A high proportion of unemployed people also experience deprivation. In Bulgaria, almost all jobless households (i.e. households having no members working) lack more than one of the items, while in Romania, nine out of 10 of these households experience multiple deprivation.

**Figure 4 Average deprivation index, by country group, 2003**



Q.20: Can your household afford each of the following items if you want it: 1) keeping your home adequately warm; 2) paying for a week's annual holiday; 3) replacing any worn-out furniture; 4) having a meal with meat every second day if you want it; 5) buying new rather than second-hand clothes; 6) having friends or family over for a drink or a meal at least once a month?  
 Source: EQLS, 2003

In both of the acceding countries, rural households are more often deprived than urban households. In Bulgaria, 90% of the households in rural areas are lacking at least two of the essential items, compared with 83% of households in urban areas; in Romania, 85% of rural households lack these items, compared with 73% of urban households.

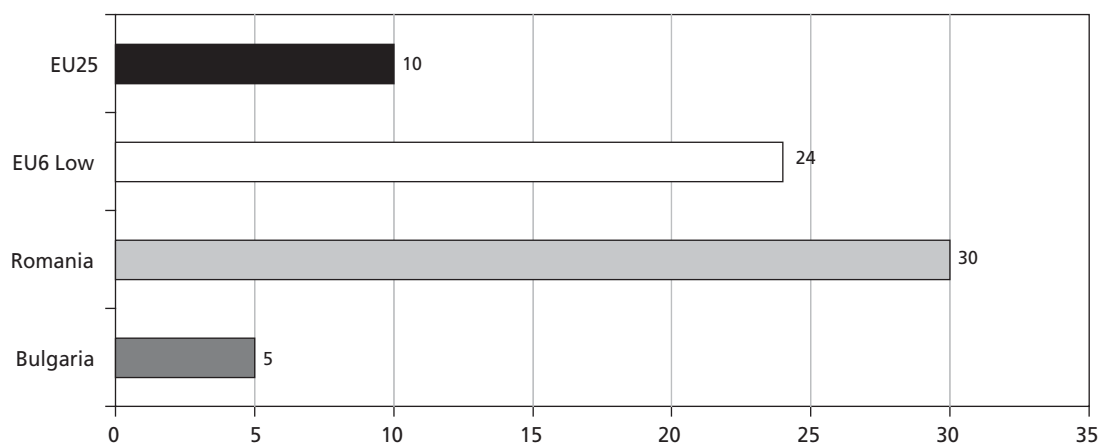
Household type and size also influence the level of material deprivation, albeit to a lesser extent, than income and place of residence. In Bulgaria, single-person and two-person households are more often deprived than other household types are: almost all Bulgarians in these groups lack at least two of the essential items. In Romania, single people and couples with children constitute the main risk groups in relation to multiple deprivation.

### Household debt

The EQLS includes a number of indicators measuring the objective economic situation of households, one of which is a household's ability to pay utility bills on time. One of the questions in the EQLS assesses whether households were in arrears in paying their utility bills during the 12-month period prior to the survey.

The survey shows that a high proportion of households in Romania (30%) had difficulties meeting regular payments for utility bills, such as electricity, water supply and gas (Figure 5). In Bulgaria, the proportion of households in arrears with their utility bills is several times lower (5%) than that in Romania and even half that of the EU25 average. It is difficult to explain why this is the case; different factors may contribute to such a scenario, such as strict administrative regulations resulting in the quick disconnection of utilities if bills are not paid on time.

**Figure 5 Percentage of households in arrears in utility bills, such as electricity, water and gas, by country group (%), 2003**



Q.59: Has your household been in arrears at any stage during the past 12 months, that is, unable to pay as scheduled any of the following: b) Utility bills, such as electricity, water, gas?

Source: EQLS, 2003

In Romania, large differences are visible between rural and urban areas in terms of the relative number of households experiencing problems in paying utility bills. About 26% of rural households in the country declare such difficulties, compared with 43% of households in urban areas. The lower figure in rural areas might be attributed to the underdeveloped infrastructure in these areas, where many communities have no running water, gas or central heating.

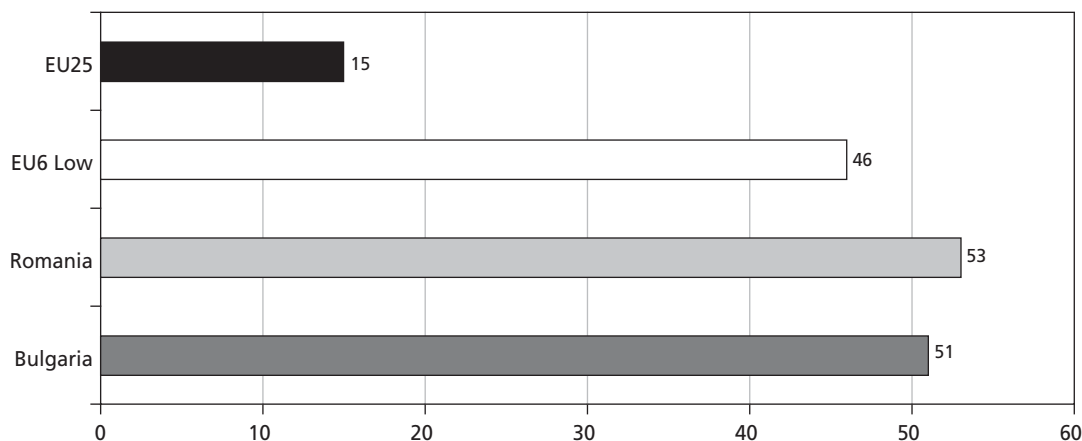
A household's ability to pay utility bills strongly depends on its financial resources. Thus, households in the lower income quartile more frequently experience difficulties paying bills for electricity, water and gas. The size and type of the household is also a factor, as the proportion of households in arrears with their utility bills increases in accordance with household size. In Bulgaria and Romania, the proportion of multi-member households that report problems paying utility bills is 30% higher than that among single-person households.

## Meeting essential needs

Household production plays an important role in helping people in low income countries to meet their food needs. In these countries, a large percentage of the population often cannot meet this need due to a lack of money. This is also confirmed by the EQLS data. The latter survey indicates that a high proportion of households in Bulgaria and Romania do not have enough money to pay for food. In Bulgaria, 29% of the households do not have enough money for food, while in Romania, 55% cannot meet this need. In the six low income EU countries, an average of 20% of the households declared that they did not always have enough money for food, while in the EU25 only 10% declared that this was the case.

Household production for personal consumption often seems to provide a means of supplementing low income in these countries. The EQLS explores this possibility by asking respondents if their household grows vegetables or fruit, or keeps poultry or livestock to meet their food needs (see Figure 6).

**Figure 6 Household production (% of households producing vegetables, fruit, or keeping poultry or livestock), by country group, 2003**



Q.61: In the past year, has your household helped meet its needs by growing vegetables or fruits, or keeping poultry or livestock?

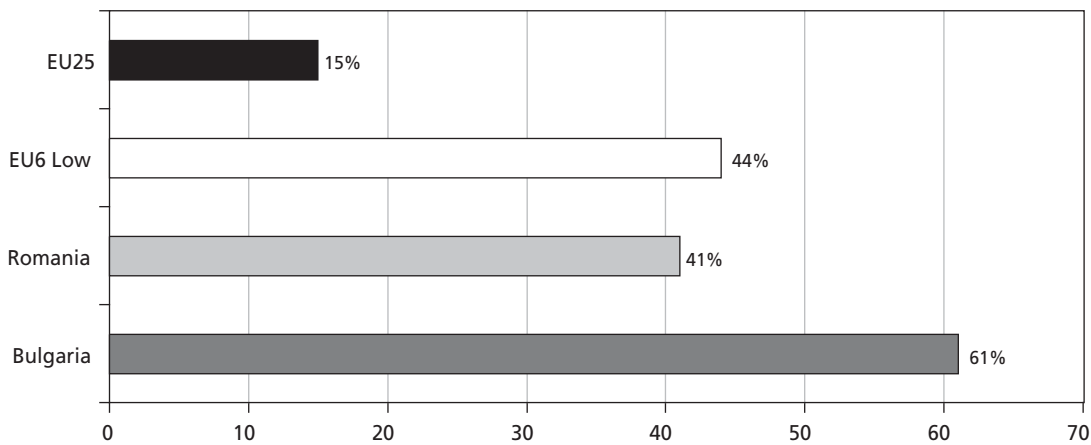
Source: EQLS, 2003

In both Romania and Bulgaria, more than half of the respondents declared that their households are engaged in growing vegetables or keeping livestock. Not surprisingly, poor households are more likely to produce food to meet their needs. In Bulgaria and Romania, 64% and 75%, respectively, of households in the lowest income quartile produce their own food, compared with 37% in the highest income quartile of both countries. In the six low income EU countries, 56% of households in the lowest income quartile produce their own food, compared with 37% in the highest income quartile. The figures are much lower in the EU25, where an average of 19% of people in the lowest income quartile and 13% of people in the higher income quartile produce their own food.

### Subjective economic strain

In the EQLS, the indicator pertaining to level of subjective economic strain is based on the respondents' perception of its household's ability to make ends meet. The response to this question is based on six answering categories, i.e. the household's ability to make ends meet: very easily; easily; fairly easily; with some difficulty; with difficulty; and with great difficulty. Based on these responses, three categories were devised in relation to level of subjective economic strain.

Generally, the level of subjective economic strain in Bulgaria, Romania and the two country groups corresponds to the differences in income levels between these countries, with the lower income countries displaying a higher proportion of people reporting difficulties in making ends meet (Figure 7). Bulgarian households stand out as having the highest percentage of those experiencing economic strain (61%). This subjective perception of a household's economic situation corresponds to the low level of average income in this country and the high level of deprivation. The situation appears to be somewhat better in Romania, where a smaller proportion of people (41%) reported difficulties in making ends meet. To some extent, this may be linked to the lower level of deprivation in the country, but also to other factors such as the higher level of positive attitudes, optimism and subjective well-being in Romania (see Chapters 7 and 8).

**Figure 7 Households experiencing difficulties in making ends meet, by country group (%)**

Q\_58: A household may have different sources of income and more than one household member may contribute to it. In relation to your household's total monthly income, is your household able to make ends meet?

Note: The categories 'with some difficulty', 'with difficulty', and 'with great difficulty' have been grouped together.

Source: EQLS, 2003

Perceived economic strain varies according to income levels. In Bulgaria, 88% of people in the lowest income quartile reported having difficulties in making ends meet, compared with 38% of people in the highest income quartile. This compares with 65% of people in the lowest income quartile in Romania and 12% of people in the highest income quartile.

Looking at the variation in subjective economic strain by area of residence, rural households in Bulgaria and Romania more frequently experience difficulties in making ends meet than urban households. In Bulgaria and Romania respectively, 65% and 46% of rural households report such difficulties, compared with 58% and 34% of urban households.

Single and jobless households have the highest proportion of people reporting financial difficulties. In Bulgaria, 67% of single households have difficulties in making ends meet, while in Romania, 56% of people in this category report that this is the case. At the same time, seven out of 10 jobless households in Bulgaria cite difficulties in making ends meet, compared with six out of 10 jobless households in Romania.





# Housing and local environment

# 2

Housing is one of the most important dimensions of people's material circumstances and has a significant impact on their quality of life. It is also an important mechanism for social inclusion, enabling people in their efforts to integrate more harmoniously into society. Housing also plays a role in helping people organise and manage their lives, providing a personalised space and basic material conditions that allow people to raise, educate and socialise their children, strengthen family ties, and feel safe and protected. In the same way, lack of such space or unfavourable and precarious housing conditions impede on individuals' health, education, and can increase the risk of social exclusion.

This chapter analyses housing conditions by considering ownership structure, living space, and quality and standard of accommodation, while underlining variations in housing conditions according to socio-demographic variables. It also takes into account the local surroundings in which houses are situated, by considering environmental conditions such as access to recreational areas, level of pollution and noise, green areas and quality of water. In doing so, it aims to reveal similarities and discrepancies in the quality of housing conditions and local environment in Bulgaria and Romania, compared with the six low income EU countries and the EU25.

## Ownership structure

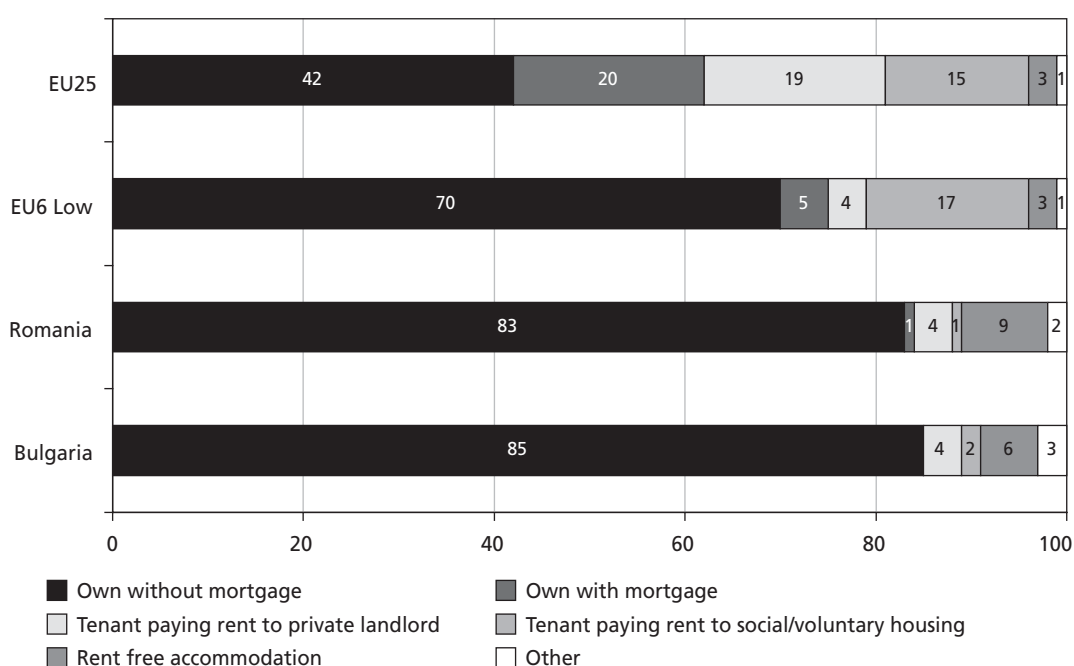
Bulgaria and Romania, along with other former communist countries, possess an ownership structure that distinguishes them from the EU15 countries. This is linked to historical differences between the countries, which have in turn contributed to distinct types of ownership. During the communist regime in these countries, the state was involved to a large extent in the funding and building of housing, particularly in urban areas, mainly in the form of blocks of flats. Apartments were distributed to people mostly through their jobs and the majority of these apartments were owned by the state. Private ownership of houses was to be found mainly in rural areas where people often built their own homes.

In the early 1990s, much of the public housing stock was privatised, which meant that the number of homeowners in Bulgaria and Romania increased substantially. However, the transfer of ownership was sometimes ambivalent and although it brought about a number of advantages, it also created difficulties for the new owners in guaranteeing the proper maintenance of the acquired property. In the 10 years after fall of communism (up to 2000), there was also a sharp decrease in the number of new houses being built using public funds, although there has been some growth in this respect in recent years. But while more private houses were being built, the overall pace of housing construction was very slow. This created substantial problems for the younger generations who were not able to access adequate housing. At the same time, mortgage lending services were limited during this period due to the unstable economic environment and high inflation rates. With the higher demands for housing, the price of houses and land began to increase dramatically, thus making it even more difficult to access housing.

In Bulgaria and Romania, home ownership is the prevailing trend, with a large majority of the population in the two countries (85% in Bulgaria and 84% in Romania) now living in their own dwelling, compared with 62% in the EU25 and 75% in the six low income EU countries (Figure 8). In fact, Bulgaria and Romania have among the highest levels of home ownership of the eastern and central European countries. When comparing the ownership structure of the two acceding countries

with that of the six low income Member States, two basic similarities emerge: one is the high proportion of home ownership and the second is the small proportion of home ownership with a mortgage. Differences begin to emerge in relation to rented dwellings and their structure. In the six low income Member States, the proportion of people who are renting – particularly tenants paying rent in social/voluntary/municipal housing – is much higher compared with the respective proportions in Bulgaria and Romania. In comparison with western European countries, which have a better-developed rental sector, the share of tenants renting privately-owned dwellings in Bulgaria and Romania is much smaller.

**Figure 8 Tenure status, by country group (%)**



Q.18: Which of the following best describes your accommodation: 1) own without a mortgage; 2) own with a mortgage; 3) tenant paying rent to private landlord; 4) tenant paying rent in social/voluntary/municipal housing; 5) accommodation is provided rent free; 6) other.

Source: EQLS, 2003

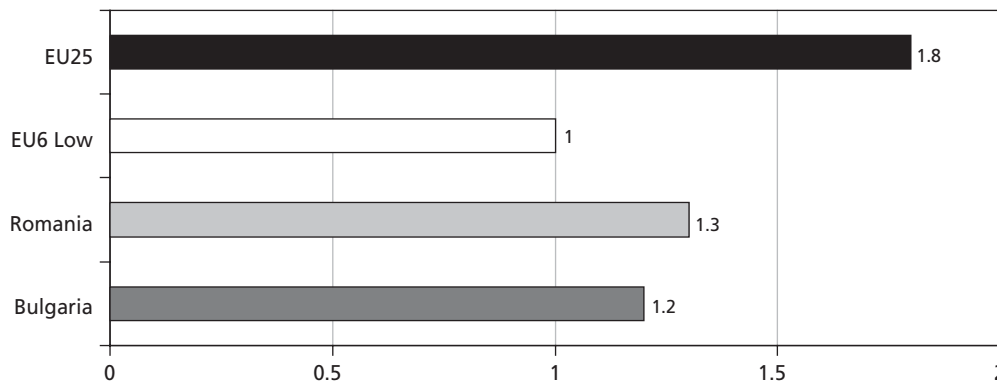
In the two acceding countries, the aforementioned ownership structure is largely reflected throughout the different social groups. Level of income, household type, family size and area of residence are not significantly associated with ownership distribution. Only one difference is evident in this respect, that is, between urban and rural areas in Romania, where home ownership is higher in rural regions (85%) than in urban areas (80%). This can be attributed to the more rapid development of the rental sector in urban areas, fuelled by the higher demand for housing in these areas.

## Living space

Size of living space is an important dimension of objective housing conditions. Living space is often measured according to two indicators: number of rooms per person in the household and size of the dwelling in square metres (total or per capita). The EQLS provides information on the average number of rooms per person while the Eurobarometer (2002) assesses the dwelling size.

In relation to the average number of rooms per person, Bulgarian and Romanian households have sufficient living space to satisfy the standard of at least one room per person (Figure 9). Compared with the six low income Member States, the situation appears to be more favourable in the two acceding countries in this respect. On average, householders in Bulgaria and Romania have more rooms at their disposal than people in Poland (0.9), Hungary (1.1) and Latvia (1.1). Nonetheless, the average number of rooms in the EU25 is still considerably higher than in Bulgaria, Romania and the six low income Member States.

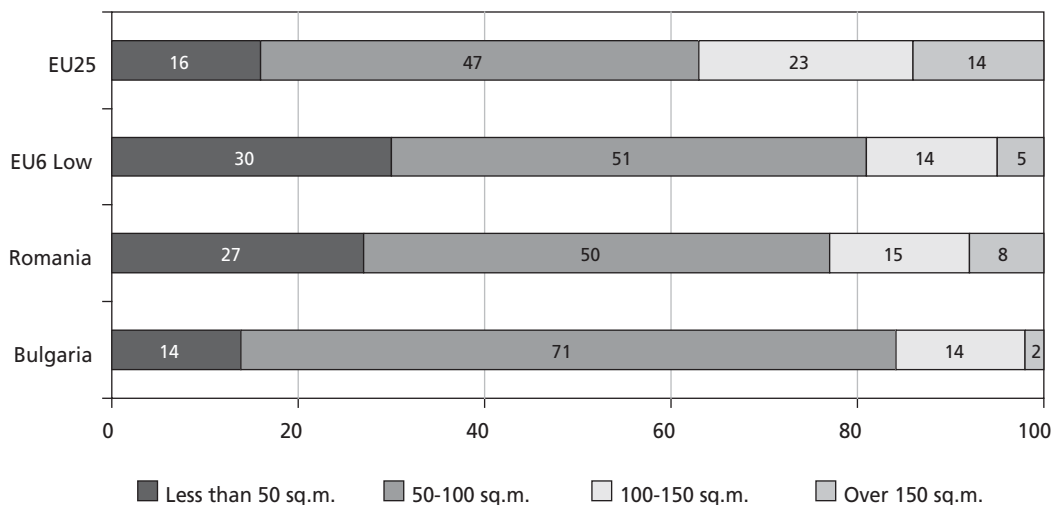
**Figure 9 Average number of rooms per person, by country group**



Q.17: How many rooms does the accommodation in which you live have, excluding the kitchen, bathroom, hallways and storerooms used solely for business?  
 Source: EQLS, 2003

With regard to the size of living space, the Eurobarometer data show that the vast majority of people in Bulgaria (71%) live in medium-sized dwellings of 50–100 square metres. In Romania, the situation is more polarised, as over a quarter (27%) of people live in very small dwellings, while almost another quarter (23%) live in larger homes of over 100 square metres (Figure 10).

**Figure 10 Dwelling size (in square metres) of households, by country group (%)**



Source: Eurobarometer, 2002

It is interesting to observe that no strong correlation exists between the average number of rooms per person and household income in the two acceding countries. In Bulgaria, households in the lowest and top income quartile have almost the same average number of rooms per person, at 1.0 room in the bottom quartile and 1.1 rooms in the highest income quartile. A similar situation exists in Romania. One possible explanation for this is the housing policy that was applied during the communist regime, which allocated housing according to family size.

In Bulgaria and Romania, people living in rural areas have more living space at their disposal than people living in urban areas (Table 1). This difference not only reflects the higher density of the population in urban areas but also the greater shortage of homes in urban areas compared with rural areas. It can also be attributed to the physical structure of housing stocks in urban and rural areas. Most dwellings in urban areas consist of apartments, often small ones. In contrast, housing stocks in rural areas are dominated by family homes which are often much larger in size, both in terms of number of rooms and size of living space.

**Table 1 Average number of rooms per person, by age, area of residence and country group**

|          | Age of respondent |             |             |           | Area of residence |       |
|----------|-------------------|-------------|-------------|-----------|-------------------|-------|
|          | 25–34 years       | 35–49 years | 50–64 years | 65+ years | Rural             | Urban |
|          | Number of rooms   |             |             |           |                   |       |
| Bulgaria | 0.9               | 1.0         | 1.4         | 1.6       | 1.3               | 1.1   |
| Romania  | 1.1               | 1.1         | 1.4         | 1.7       | 1.3               | 1.2   |
| EU6 Low  | 0.8               | 0.9         | 1.2         | 1.5       | 1.0               | 1.1   |
| EU25     | 1.6               | 1.6         | 1.9         | 2.4       | 1.8               | 1.7   |

*Note:* In considering the relationship between living space and age, it should be taken into account that respondents' ages do not accurately reflect the situation of the household.

*Source:* EQLS, 2003

A significant correlation also emerges between the number of rooms and age (Table 1). The average number of rooms per person is highest among respondents in the oldest age group (65 years and over), a pattern which is valid for all the countries and country groups. Meanwhile, the younger age group (25–34 years) have less living space at their disposal compared with most of the other age groups. This can be attributed to the fact that people generally invest in housing during the course of their lives and in their older years, often benefit from increased space. Moreover, as young people move out of the parental home, fewer generations are living together (Domanski and Ostrowska, 2004); as a result, parents – who usually constitute people in the older age groups – have an increased number of rooms at their disposal.

### Standard of accommodation

The standard of accommodation is, next to size of living space, another important dimension of housing conditions. In Bulgaria and Romania, housing problems in urban areas are mainly related to the rather old infrastructure of the buildings, for instance in terms of plumbing, heating systems and elevators, while communal areas in the larger complexes and blocks of flats are often not adequately maintained. In rural areas, housing problems are related to the lack of infrastructure, as many villages still do not have basic facilities such as running water, sewer systems and gas.

The EQLS measures the quality of accommodation by asking respondents if they have encountered particular problems with accommodation, such as a shortage of space, rot in windows, doors and floors, damp in the walls and roof leaks, and lack of an indoor flushing toilet. Based on the respondents' replies, an indicator of multiple housing deficit was constructed. Accordingly, people are considered to have multiple housing disadvantages if they cite at least two of the aforementioned housing problems.

**Table 2 Households declaring problems with accommodation, by country group (%)**

|          | Shortage of space | Rot in windows, doors and floors | Damp and leaks | Lack of indoor flushing toilet | Have at least two of the problems |
|----------|-------------------|----------------------------------|----------------|--------------------------------|-----------------------------------|
| Bulgaria | 24                | 21                               | 25             | 29                             | 26                                |
| Romania  | 28                | 30                               | 29             | 40                             | 35                                |
| EU6 Low  | 26                | 29                               | 20             | 11                             | 24                                |
| EU25     | 18                | 11                               | 14             | 3                              | 11                                |

Q.19: Do you have any of the following problems with your accommodation: 1) Shortage of space; 2) Rot in windows, doors or floors; 3) Damp/leaks; 4) Lack of indoor flushing toilet?

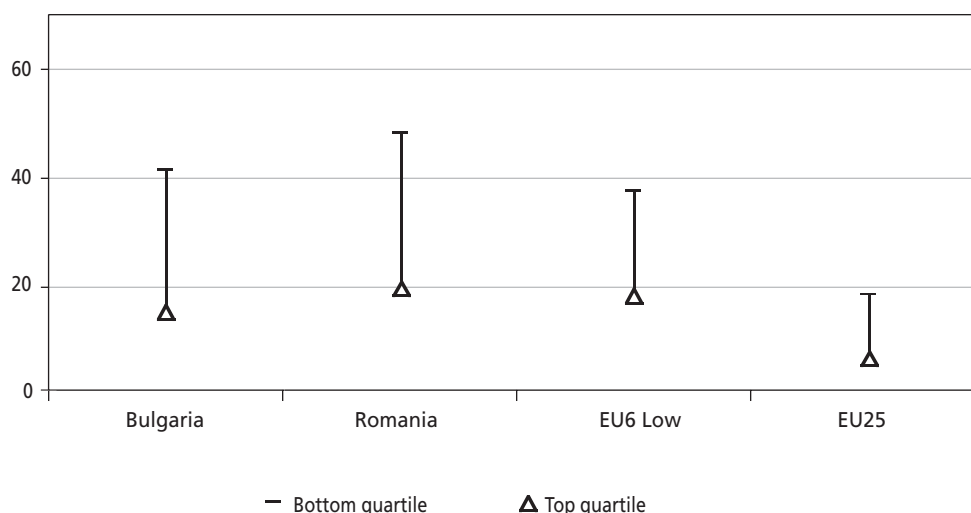
Source: EQLS, 2003

The EQLS indicators show a considerably low standard of housing in the two acceding countries. In Bulgaria, more than a fifth of the respondents cited each of the accommodation problems (Table 2). Lack of an indoor flushing toilet, which is uncommon in the EU25 countries, was the most frequently reported housing problem among Bulgarians. More than a quarter of respondents in Bulgaria cited multiple disadvantages (having at least two of the problems) in relation to the selected dimensions of housing standards; although this proportion is almost equal to the average for the six low income EU countries, it is still more than twice as high as the average figure for the EU25.

The standard of accommodation seems to be even lower in Romania than in Bulgaria. In Romania, as in Bulgaria, the most frequently reported problem with accommodation is lack of an indoor flushing toilet. Four out of 10 of the respondents reported this problem, which is far higher than the number of people citing this problem in the six low income Member States or in the EU25. People in Romania also complain more often about damp and leaks, rot in windows, doors and floors and shortage of space than do people in the six low income countries, the EU25 and even in Bulgaria. The percentage of those experiencing multiple problems with accommodation in Romania is also the highest, compared with the two other country groups and Bulgaria.

There is a clear relationship between housing problems and level of income, as the proportion of people reporting multiple housing problems is significantly higher in the lowest income quartile than in the top income quartile (Figure 11). In Bulgaria, 41% of households from the lowest income quartile cite two or more housing problems, while 15% of respondents in the top income quartile report that this is the case. A similar picture emerges in Romania, where as many as 48% of people in the bottom income quartile report multiple housing problems, compared with 19% in the top income quartile. Not surprisingly therefore, people in the lowest income group live in much poorer housing conditions, which in turn increases their risk of poor health, social exclusion and other related disadvantages. For this reason, proper policy measures should be put into place to target this vulnerable category of householders.

**Figure 11** Households reporting two or more accommodation problems, by income quartile and country group (%)



Source: EQLS, 2003

### Local environment

The EQLS uses four main indicators to assess the quality of the local environment, namely: noise, air pollution, lack of access to green areas, and water quality. The overall picture indicates that the proportion of people complaining about the local environment does not differ greatly between the countries and country groups in question. However, in the case of Romania, air pollution appears to be the most frequently reported environmental problem, while in Bulgaria, water quality caused the most concern. Thus, these two problematic areas should be targeted by appropriate environmental policy.

**Table 3** Respondents complaining about environmental problems, by country group (%)

|          | Noise | Air pollution | Lack of access to green areas | Water quality |
|----------|-------|---------------|-------------------------------|---------------|
| Bulgaria | 19    | 24            | 18                            | 31            |
| Romania  | 19    | 26            | 17                            | 21            |
| EU6 Low  | 19    | 21            | 16                            | 21            |
| EU25     | 18    | 18            | 16                            | 15            |

Q.56: Please think about the area where you live now – that is, the immediate neighbourhood of your home. Do you have very many reasons, many reasons, a few reasons, or no reason at all to complain about each of the following problems: noise, air pollution, lack of access to recreational or green areas, and water supply?

Source: EQLS, 2003

Considerable discrepancies arise between rural and urban regions with regard to people's assessment of the local environment. Bulgarians and Romanians residing in urban areas appear to be much more critical of all four environment aspects (Table 4). This pattern is evident across Europe and is not surprising given the fact that air pollution, noise and lack of green areas are more typical in cities. In addition, people living in Bulgaria appear to be concerned about water quality, particularly those

living in urban areas. In Romania, a significant proportion of people living in urban areas are also concerned about water quality, as well as noise levels and lack of access to green areas.

**Table 4 Respondents complaining about environmental problems, by area of residence and income quartile (%)**

|          | Noise     |       |                 |                  | Air pollution |       |                 |                  |
|----------|-----------|-------|-----------------|------------------|---------------|-------|-----------------|------------------|
|          | Residence |       | Income          |                  | Residence     |       | Income          |                  |
|          | Rural     | Urban | Lowest quartile | Highest quartile | Rural         | Urban | Lowest quartile | Highest quartile |
| Bulgaria | 8         | 29    | 19              | 21               | 10            | 37    | 22              | 30               |
| Romania  | 12        | 27    | 13              | 21               | 15            | 38    | 18              | 28               |
| EU6 Low  | 12        | 26    | 18              | 21               | 10            | 32    | 19              | 23               |
| EU25     | 13        | 22    | 20              | 16               | 11            | 24    | 18              | 18               |

|          | Lack of access to green areas |       |                 |                  | Water quality |       |                 |                  |
|----------|-------------------------------|-------|-----------------|------------------|---------------|-------|-----------------|------------------|
|          | Residence                     |       | Income          |                  | Residence     |       | Income          |                  |
|          | Rural                         | Urban | Lowest quartile | Highest quartile | Rural         | Urban | Lowest quartile | Highest quartile |
| Bulgaria | 13                            | 22    | 19              | 18               | 20            | 42    | 28              | 39               |
| Romania  | 9                             | 26    | 9               | 21               | 15            | 30    | 14              | 28               |
| EU6 Low  | 7                             | 24    | 15              | 16               | 14            | 28    | 20              | 21               |
| EU25     | 10                            | 20    | 18              | 13               | 13            | 17    | 17              | 15               |

Q.56: Please think about the area where you live now – that is, the immediate neighbourhood of your home. Do you have very many reasons, many reasons, a few reasons, or no reason at all to complain about each of the following problems: noise, air pollution, lack of access to recreational or green areas, and water supply?

Source: EQLS, 2003

There is also a correlation between income and dissatisfaction with the local environment. In Bulgaria and Romania, people in the top income group generally complain more frequently about environmental problems than those in the bottom income quartile. In the EU25, the reverse is true with people in the low income groups complaining more often about local environment problems; this may be linked to the characteristics of housing exclusion in western European societies, where people from low income groups often live in the poorer neighbourhoods of large cities, where traffic is heavy and air and noise pollution are high. In post-communist countries, like Bulgaria and Romania, this sort of division is not that common, so far at least; rich and poor people often live in the same neighbourhoods, which means that they share the same environment. Thus, the greater level of criticism about the environment among people in the top income quartile could possibly be attributed to the higher aspirations of these people in relation to their local environment.

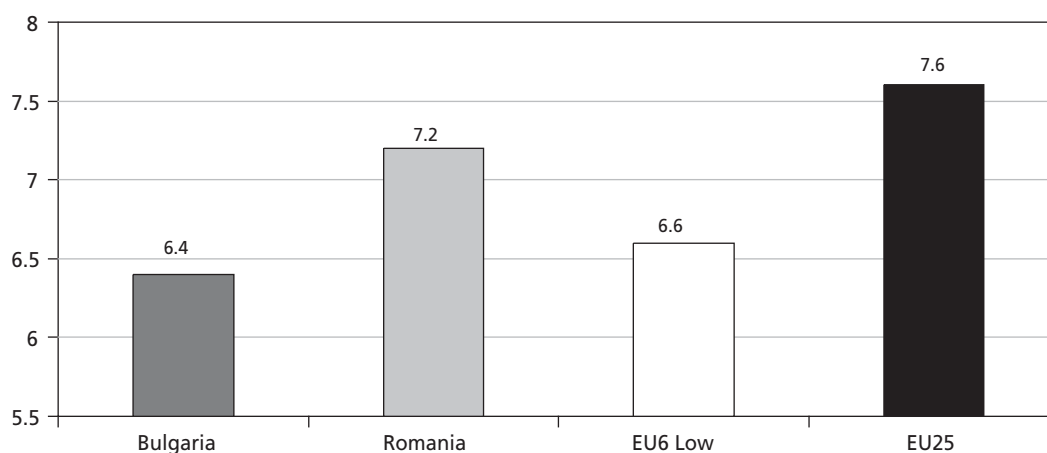
## Satisfaction with accommodation

Satisfaction with housing conditions largely depends on objective conditions; however, it also reflects people's aspirations and expectations in relation to their accommodation. In the EQLS, respondents were asked to express their level of satisfaction with their accommodation on a scale of one to 10, where one means very dissatisfied and 10 means very satisfied. The survey results show that people in Bulgaria display a low level of satisfaction with their accommodation, with an average score of 6.4 (Figure 12). This places Bulgaria towards the bottom of the ladder, with only Lithuania (5.9) and



Latvia (6.3) displaying lower average scores. In Romania, people are more satisfied with their accommodation, judging by the satisfaction rating of 7.2, which compared favourably with the EU25 average of 7.6. Among the EU25 countries, the best ranked countries are Austria and Denmark, which recorded an average satisfaction score of 8.3 and 8.4 respectively.

**Figure 12 Average level of satisfaction with accommodation, by country group**



Q.41d: Could you please tell me on a scale of one to 10, where one means very dissatisfied and 10 means very satisfied, how satisfied you are with each of the following items: your accommodation?

Source: EQLS, 2003

Satisfaction with accommodation also appears to increase with age (Table 5); this mirrors the fact that older generations have, on average, a larger living space at their disposal. It may also reflect the fact that they have been able to invest more in their houses during their lives to improve the quality of the dwelling, and that they may have developed a significant sense of attachment towards their dwelling.

**Table 5 Average level of satisfaction with accommodation, by age, income and country group**

|          | Age of respondent |             |             |             |                   | Income          |                  |
|----------|-------------------|-------------|-------------|-------------|-------------------|-----------------|------------------|
|          | 18–24 years       | 25–34 years | 35–49 years | 50–64 years | 65 years and over | Lowest quartile | Highest quartile |
| Bulgaria | 6.3               | 5.7         | 6.1         | 6.7         | 6.9               | 5.8             | 6.7              |
| Romania  | 7.4               | 6.9         | 7.0         | 7.5         | 7.4               | 6.9             | 7.6              |
| EU6 Low  | 6.6               | 6.3         | 6.3         | 6.6         | 7.1               | 5.8             | 6.9              |
| EU25     | 7.4               | 7.2         | 7.4         | 7.7         | 8.0               | 7.0             | 7.9              |

Q.41d: Could you please tell me on a scale of one to 10, where one means very dissatisfied and 10 means very satisfied, how satisfied you are with each of the following items: your accommodation?

Source: EQLS, 2003

Finally, the highest level of satisfaction with accommodation is recorded among those in the top income quartile in Bulgaria and Romania. This reflects the better objective housing conditions of people in this income group, who generally have larger houses and more financial resources to invest in modern amenities, and who therefore are more satisfied with their accommodation than people in the lower income groups.

The goals of the Lisbon Strategy aim to make Europe the most competitive and dynamic knowledge-based economy in the world, at the same time creating more and better jobs, and increasing social cohesion. Providing access to high quality jobs plays an essential role in increasing social inclusion, protecting individuals against poverty and helping people live active and better lives. Alongside the objective to create more and better jobs, increasing emphasis is now being placed on implementing the key priorities of the European Employment Strategy, namely: to attract and retain more people in employment, to increase labour supply and modernise social protection systems, to improve the adaptability of workers and enterprises, and to increase investment in human capital through better education and skills.

This chapter explores the characteristics of employment and unemployment in Bulgaria and Romania, while also highlighting important features of human capital like education and skills. In doing so, it examines both objective conditions (number of jobs, unemployment rate, part-time work) and subjective assessments (quality of jobs, job satisfaction, perceived job security) of employment, as well as people's education and skill levels (e.g. English language and computer skills), which are useful for obtaining a high quality job.

## Employment and unemployment

During the past 16 years, Bulgaria and Romania have undergone extensive economic and social transformations, related to their transition to the market economy.<sup>6</sup> Changes in the labour market, in particular, have impacted heavily on broad segments of the population. In the first seven to eight years of transition, many of the inefficient, state-owned enterprises were either closed down or privatised, resulting in the loss of thousands of jobs. As a result, unemployment increased considerably in both countries, affecting almost a fifth of the total labour force. A sharp decrease in economic output during the 1990s placed enormous pressure on the social funds, which meant that they were incapable of providing an adequate social safety net. At the same time, the average household income dropped considerably. In particular, elderly workers, unskilled workers and those with health problems were most vulnerable to huge income losses and increased poverty.

However, from the late 1990s onwards, both economies began to show signs of more positive trends. Economic output increased, first moderately and then more rapidly after 2000, leading to a positive impact on job creation and employment. As a result, the level of unemployment began to decrease considerably: since 2003, the rate of unemployment has stabilised at about 7% in Romania and 13% in Bulgaria.

Despite the strong economic growth and considerable increase in job creation in the last four to five years, the overall employment rate is still low in Bulgaria (52.5%) and Romania (56.7%), compared with the EU25 average of 63.1% (data for 2003). Increasing the employment rate and narrowing the gap with EU countries will be one of the biggest challenges facing economic and social policymakers in Bulgaria and Romania, particularly in light of the European Employment Strategy target of increasing the overall employment rate to 70% by 2010.

<sup>6</sup> Note: the data used in this section are taken from Eurostat and, if not specified, refer to the fourth quarter of 2003 (*Statistics in Focus*, Labour Market Trends, No. 6/2005).

Increasing the labour market participation of specific population groups represents another challenge for the two acceding countries. In Bulgaria, for example, the female employment rate (48.8%) is among the lowest in Europe, while in Romania the rate (51%) is only slightly better compared with international standards. Many factors contribute to the low labour participation rate of women in these two countries, ranging from a low level of overall employment, limited possibilities for part-time work (particularly in Bulgaria) and flexible working time options (working time accounts, parental leave, care leave, etc) to an inadequate supply of childcare facilities. Cultural factors, such as the traditional division of tasks within families, and social factors may also play a significant role in preventing women from participating in the labour market.

In relation to employment rates among young people (aged 15–24 years), Bulgaria has the lowest rate in this respect in Europe, at just 20.7%. The employment rate among older workers (aged 55–64 years) is also comparatively low at 30%. In Romania, the labour participation rate of young people is higher, at 26.4%, although this still lags far behind the EU25 average of 36.7%. The employment rate of older workers in Romania is also higher than that of Bulgaria, at 38.1% – a figure which is not that much lower than the EU25 average of 40.2% (European Commission, 2005).

Employment levels in the different sectors also point to certain challenges for labour market policies in the two acceding countries. In Romania, a high proportion of total employment is to be found in the agricultural sector (34.1% in 2003); this factor should be given particular attention given the low level of productivity in this sector. In the medium-term, EU agricultural policy will put considerable pressure on Romania's non-competitive farming sector, which might in turn lead to substantial labour surpluses in rural areas of the country. This is also true, albeit to a somewhat lesser extent, for Bulgaria where agriculture accounts for 10% of total employment,<sup>7</sup> which is still double the EU25 average of 5% (European Commission, 2005).

In relation to the proportion of total employment pertaining to part-time work, considerable differences emerge between the two acceding countries. In Bulgaria, only 2.3% of all employees work part time (2003), which is by far the lowest rate among all of the 27 countries studied. The Romanian labour market seems to be more flexible in this respect, with 11.5% of jobholders working part time; nonetheless, this figure is still considerably below the EU average of 15.6% (European Commission, 2005). In Romania, more than half of all part-time workers are women; the majority of the part-time workers live in rural areas, are self-employed or unpaid family workers, and are nearly all looking for a permanent job (Stanculescu, 2003). Thus, in Romania, part-time work represents an alternative to unemployment and is generally not a job of choice. Initially, the country's employment legislation was very favourable towards part-time jobs. Companies often preferred to employ workers on part-time contracts as it meant they had to pay fewer taxes and could cater for a higher turnover of personnel. However, more recent employment legislation has reconsidered these contracts, and in the last two years, part-time jobs have been increasingly viewed as a form of flexible employment rather than as an alternative to unemployment or substitute for full-time work.

In relation to unemployment in Bulgaria and Romania, the situation has improved significantly since 2000. However, there are considerable differences between the two countries with regard to unemployment levels. In 2003, the unemployment rate in Bulgaria was 13.7%, compared with 6.8%

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<sup>7</sup> Other sources do, however, mention a much higher proportion of total employment for Bulgaria's agricultural sector, estimated at 25.5% (*Road to Successful EU Integration, The Policy Agenda, Country Economic Memorandum*, World Bank, 2005).

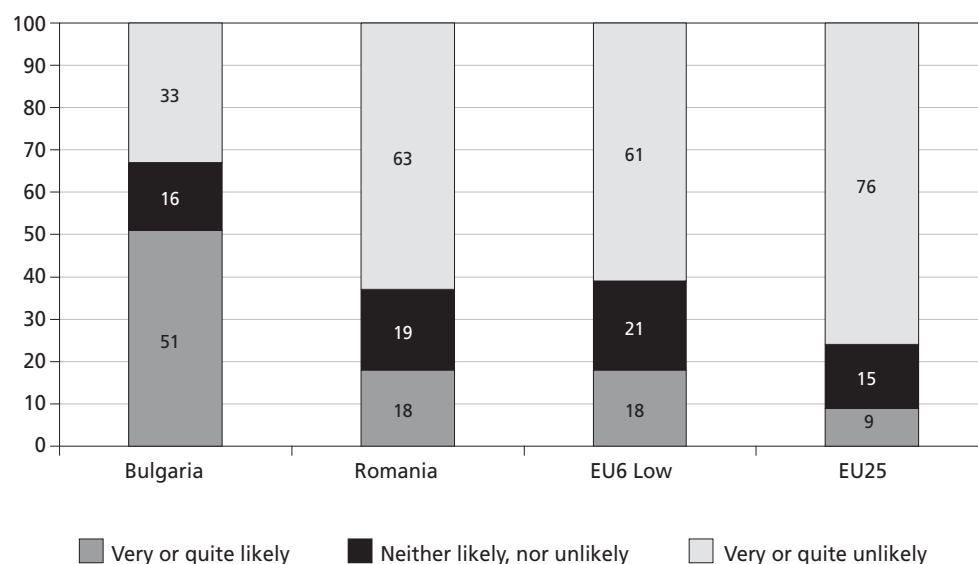
in Romania and an average of 9.2% in the EU25. An important challenge for both of the acceding countries is tackling long-term unemployment. Almost two-thirds of all unemployed people have been without a job for one year or longer. Groups that are particularly at risk of long-term unemployment are young people, those with low skill levels and older people. Tackling long-term unemployment therefore requires the careful selection, targeting and effective implementation of specific labour market policy measures (e.g. activation policies) in the two acceding countries.

So far, employment policies in Bulgaria and Romania have encompassed passive measures (financial support) rather than active ones (training, coaching, providing incentives for the creation of income-generating activities). Although there have been a few initiatives in the active policy area, the majority of these measures were not very successful. A particular problem in both Romania and Bulgaria is that, although the policies exist in principle, they only reach a small proportion of the target population in practice (Stanculescu, 2003).

### Perceived job security

Individuals' perceptions of their own level of job security can reflect the overall economic situation of a country as well as the specific circumstances of the person's job. Perceived job security can also be considered an indicator of level of income security (Tremblay, 2002). In the EQLS, respondents were asked whether it was likely that they could lose their jobs in the next six months (see Figure 13).

**Figure 13 Perceived likelihood of losing one's job in next six months, among employed respondents (%)**



Q.11: How likely do you think it is that you might lose your job in the next six months?

Source: EQLS, 2003

In Bulgaria, a remarkably large proportion of just over a half of the respondents (51%) indicated that they felt insecure about their job – by far the largest figure across all of the 27 countries. In Romania, nearly a fifth of employees (18%) cited the likelihood of losing their job within the next six months. Although this figure was the same in the six low income EU countries, it was still high in comparison with the EU25 average of 9%. The differences between Bulgaria and Romania in this respect might

be explained by the much higher unemployment rate in Bulgaria and by the higher incidence of temporary, short-term contracts in this country (see Eurostat, 2005). In addition, the number of workers with a second job, a factor which might result in a stronger feeling of job security, is much lower in Bulgaria: only 5% of employees in Bulgaria have a second job, compared with 12% of employees in Romania. The higher sense of job insecurity in Bulgaria may also be partly related to the fact that a large number of people have been employed by new, privately-owned firms (in small business), which do not often survive as long as other enterprises.

In both of the acceding countries, a significant proportion of people work in the informal economy, which is characterised by low pay, poor working conditions and a low level of employee protection in relation to working time and length of contract. However, in Romania, a large number of people are employed in the agricultural sector; this may partly explain the lower sense of job insecurity in Romania compared with Bulgaria, as small farmers who have their own plot of land and production means may tend to feel more secure about their livelihood.

Perceived job insecurity does not appear to differ greatly between the two sexes. However, in Romania, age does seem to correlate with differences in people's perception of job security. Accordingly, a relatively high proportion of young people (aged 18–24 years) feel insecure about their job; this proportion appears to decrease with age. Job insecurity is lowest among older workers (aged 55–64 years) in Romania. In Bulgaria, the correlation between age and perceived job insecurity is not that strong.

## **Job quality**

Improving the quality of jobs is an important objective of the European Employment Strategy, along with increasing the number of jobs. The EQLS provides useful information on different aspects of job quality in the EU and acceding countries. Respondents of the survey were asked to evaluate seven aspects of their job; three of these aspects relate to positive dimensions of their job (good career prospects, a favourable salary, a great deal of influence in decision making) and four relate to negative aspects of the job (stressful work, boring and dull job, tight deadlines, and dangerous and unhealthy conditions).

In relation to the three positive aspects of work, the difference in views between Bulgarians and Romanians is not that significant, except with regard to payment where a higher proportion of Romanians are more satisfied (Table 6). However, the gap between the two acceding countries and the EU25 in this respect remains large, with the proportion of EU citizens who are positive about their career prospects, salary and the degree of influence in decision making in their jobs being considerably higher than those in Bulgaria and Romania.

Regarding the negative aspects of the job, the majority of Bulgarians (63%) perceive their jobs as being stressful; the proportion of Romanians who share this view is lower (47%) and closer to the average of the six low income EU countries (50%) and the EU25 (47%). At the same time, more Romanian workers (38%) than Bulgarian workers (22%) cite that they are constantly working under tight deadlines. A particular cause for concern is the fact that around one third of respondents in the two acceding countries perceive their work to be dangerous and as having unhealthy conditions – a proportion which is almost twice the EU25 average (17%). These findings indicate that the quality

of jobs is relatively poor in Bulgaria and Romania and that improving job quality should be one of the key objectives of national social and economic policies.

**Table 6 Respondents who agree or strongly agree with various statements about their job (%)**

|          | Positive characteristics |  |   | Negative characteristics               |                            |                                      |  |
|----------|--------------------------|--|---|--|----------------------------|--------------------------------------|--|
|          | I am well paid           | I have a great deal of influence in deciding how to do my work | My job offers good prospects for career advancement | My work is too demanding and stressful | My work is dull and boring | I constantly work to tight deadlines | I work in dangerous and unhealthy conditions |
| Bulgaria | 16                       | 48   | 22  | 63                                     | 10                         | 22                                   | 30   |
| Romania  | 22                       | 50   | 21  | 47                                     | 11                         | 38                                   | 33   |
| EU6 Low  | 20                       | 50   | 27  | 50                                     | 18                         | 43                                   | 32   |
| EU25     | 39                       | 63   | 34  | 47                                     | 11                         | 46                                   | 17   |

Q.12: How much do you agree or disagree with the following statements describing positive and negative aspects of your job?  
Source: EQLS, 2003

## Job satisfaction

Job satisfaction describes the subjective feelings that people have about their job as a result of objective working conditions and their own expectations and aspirations regarding their work. In the EQLS, respondents were asked to rate their job satisfaction on a scale of one to 10, where one means very dissatisfied and 10 means very satisfied. The results varied considerably across the countries, not surprisingly indicating a higher level of job satisfaction in countries with better jobs and more favourable working conditions.

In Bulgaria, the average level of job satisfaction is 6.3, which is one of the lowest levels in Europe. This could be attributed to the low quality of jobs in the country and also to the perceived sense of job insecurity. In Romania, where the perceived job insecurity is not as widespread, people show relatively high levels of job satisfaction (7.4) which corresponds more to the EU25 average. The countries with the highest level of job satisfaction in the EU25 are Denmark (8.1), and Finland and Germany (both at 7.9).

Looking at the level of job satisfaction according to the socio-demographic characteristics of the respondents, there appears to be a relationship between age and job satisfaction: older people are more satisfied with their job than the younger respondents. This correlation is particularly strong in the two acceding countries.

There is also an obvious link between income and job satisfaction: people in the highest income quartile are more satisfied with their job than those in the lowest income quartile. In Bulgaria and Romania respectively, people in the top income quartile display a job satisfaction score of 6.4 and 8.0, while those in the bottom quartile show a score of 5.9 and 6.6. In terms of occupational status, there is a clear correlation between higher job satisfaction and a better occupation. Managers display the highest levels of job satisfaction, while manual workers, particularly low-skilled workers, show the lowest level of job satisfaction. In the two acceding countries, people employed in high-skill sectors of the economy – such as finance, real estate, public administration and education – seem

to be more satisfied with their work than those in lower skill sectors such as construction and agriculture. This pattern also holds true for the six low income EU countries and the EU25.

**Table 7 Level of job satisfaction, by occupational status, age and country group**

|          | Occupational status      |                  |               |                |                  | Age         |             |
|----------|--------------------------|------------------|---------------|----------------|------------------|-------------|-------------|
|          | Professional, managerial | Other non-manual | Self-employed | Skilled manual | Unskilled manual | 18–24 years | 50–64 years |
| Bulgaria | 7.2                      | 6.6              | 7.6           | 5.7            | 5.2              | 5.3         | 6.9         |
| Romania  | 8.1                      | 7.5              | 7.7           | 7.1            | 5.3              | 6.7         | 7.9         |
| EU6 Low  | 7.8                      | 7.2              | 7             | 6.4            | 5.6              | 6.2         | 7.1         |
| EU25     | 7.9                      | 7.3              | 7.7           | 6.8            | 6.4              | 7.0         | 7.4         |

*Q.41b:* Could you please tell me on a scale of one to 10, where one means very dissatisfied and 10 means very satisfied, how satisfied you are with your present job?

Source: EQLS, 2003

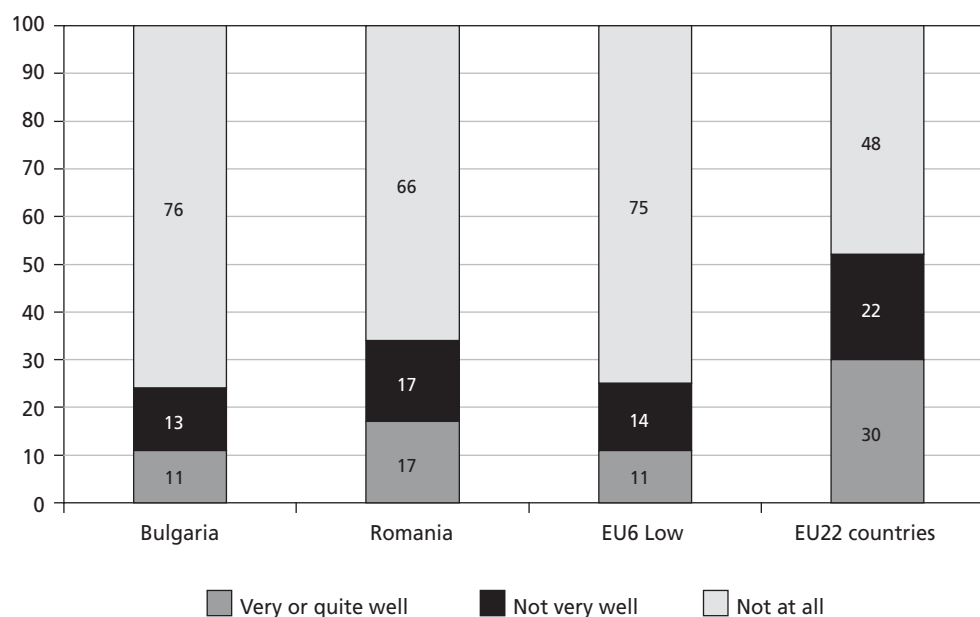
Beside socio-demographic factors, other characteristics can also influence job satisfaction. The size of the company in which people work, for example, determines some variation in job satisfaction levels in the two acceding countries. The EQLS data for Bulgaria show that people working in small companies are less satisfied with their job (6.0) than employees working in larger firms (7.5).

## Education and skills

Level of education is an important dimension of human capital. Continuous education, training and development of skills are essential for obtaining competitive jobs in today's society. Knowledge of English as well as computer and internet skills are also basic competencies that are increasingly required in the labour market.

In terms of educational level, the two acceding countries score quite high in this respect. A rather large proportion of adults have at least an upper secondary education in Bulgaria (71%) and Romania (70.4%) compared with the EU25 average (66.4%). A possible explanation for this is the particular emphasis that was placed on the educational system during the communist regime in these two countries, with secondary education being compulsory.

In Europe's knowledge-based society, where new information and communication technologies have gained increasing ground, knowledge of English, computer skills and internet usage are seen as important tools for life and work. However, people in the former communist countries frequently do not have these skills. Looking at the EQLS data in relation to peoples' ability to read English (Figure 14), it can be seen that a low proportion of people in Bulgaria (11%) display a good standard of English literacy skills; a similar situation can also be found in the six low income EU countries. In Romania, the corresponding share is higher (17%) but still far behind the EU25 average (30%). Across Europe (excluding English-speaking countries), the Scandinavian countries have the largest proportion of English readers (about 70%) followed by Cyprus (61%). This proportion is much smaller in EU countries like Poland and Hungary, where only around 9% of the respondents reported having this skill.

**Figure 14 Percentage of English readers, by country group**


Q.51: How well do you read English? Note: English-speaking countries (Ireland, Malta and the UK) have been excluded from the EU25 category.

Source: EQLS, 2003

In Bulgaria and Romania, the ability to read English is strongly linked to level of education and age (Table 8). English literacy is higher among the more educated and younger people. However, the EQLS data do not indicate significant differences between men and women in terms of knowledge of English.

**Table 8 Respondents who can read English 'very well' or 'quite well', by country group (%)**

|                 | Age at completing full-time education |             |           |                | Present age |             |             |             |           |
|-----------------|---------------------------------------|-------------|-----------|----------------|-------------|-------------|-------------|-------------|-----------|
|                 | Up to 15 years                        | 16–19 years | 20+ years | Still studying | 18–24 years | 25–34 years | 35–49 years | 50–64 years | 65+ years |
| Bulgaria        | 2                                     | 6           | 21        | 58             | 31          | 16          | 10          | 6           | 1         |
| Romania         | 3                                     | 8           | 28        | 78             | 50          | 25          | 10          | 13          | 2         |
| EU6 Low         | 1                                     | 5           | 20        | 49             | 33          | 14          | 8           | 3           | 2         |
| 22 EU countries | 4                                     | 22          | 53        | 76             | 57          | 48          | 32          | 19          | 9         |

Q.51: How well do you read English? Note: English-speaking countries (Ireland, Malta and the UK) have been excluded from the EU25 category.

Source: EQLS, 2003

Internet usage is increasingly being considered as an essential skill in today's society; as a result, more policies are being put into place to ensure that people have access to this relatively new technology. According to the EQLS data, 32% of people living in the EU25 countries use the internet at least a couple of times a week. In the two acceding countries, a much smaller percentage of the population use the internet with the same frequency (8% in Bulgaria and 11% in Romania).



The analysis of internet usage according to different socioeconomic characteristics reveals similar patterns as in the case of English reading ability. Younger and more educated people use the internet much more frequently. Moreover, people living in urban areas are more frequent internet users than people living in rural areas.

**Table 9 Internet usage, by age at completing full-time education and current age (%)**

|                 | Age at completing full-time education |             |           |                | Current age |             |             |             |           |
|-----------------|---------------------------------------|-------------|-----------|----------------|-------------|-------------|-------------|-------------|-----------|
|                 | Up to 15 years                        | 16–19 years | 20+ years | Still studying | 18–24 years | 25–34 years | 35–49 years | 50–64 years | 65+ years |
| Bulgaria        | 1                                     | 4           | 13        | 69             | 24          | 13          | 7           | 4           | 0         |
| Romania         | 2                                     | 5           | 21        | 46             | 29          | 21          | 7           | 2           | 1         |
| EU6 Low         | 1                                     | 8           | 30        | 57             | 26          | 23          | 16          | 5           | 1         |
| 22 EU countries | 8                                     | 25          | 52        | 69             | 52          | 49          | 38          | 22          | 5         |

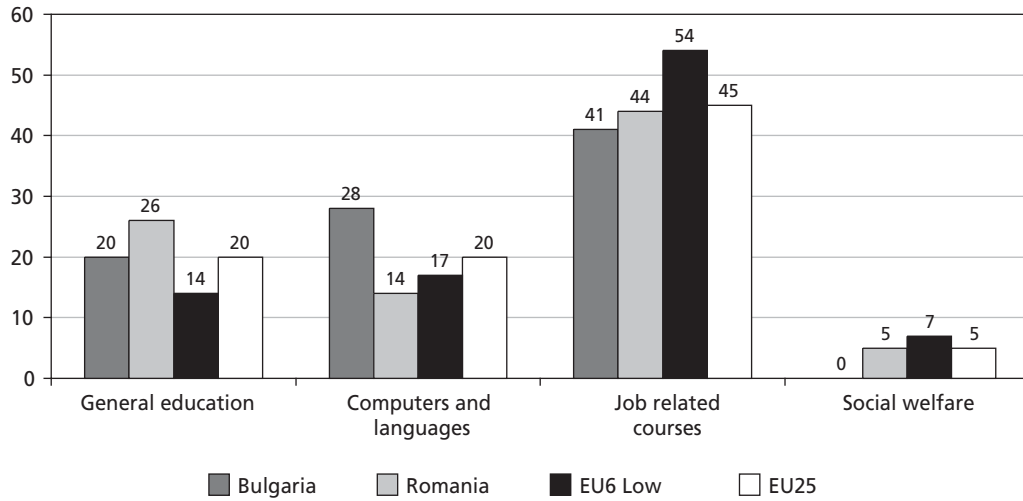
Q.52: Which of the following best describes your level of internet usage over the past month: 1) at least a couple of times a week?

Source: EQLS, 2003

Lifelong learning is widely acknowledged as an important tool for improving the quality of the labour force and for achieving higher productivity. Continuous education is also crucial for enhancing people’s employability in today’s ever-demanding labour market. The EQLS results on training are not that favourable for the two acceding countries, particularly for Bulgaria, where only 5% of the respondents took a course in the year preceding the survey; only half of these respondents chose a general education, language or computer training course, while the other half chose courses which were job related (Figure 15). A possible explanation for the low level of participation in training in Bulgaria is the lack of investment in innovation and new technologies in the country, particularly by smaller enterprises (with 1–9 employees), which dominate the Bulgarian economy.

Overall, a higher proportion of people in Romania (12%) than in Bulgaria have participated in training courses; however, this figure is still significantly lower than the average for the six low income Member States (18%) and the EU25 (21%). In fact, the results for both Romania and Bulgaria are a cause for concern, since investing in people by providing better opportunities in education, training and lifelong learning is seen as a key determinant for the increased competitiveness of EU economies; moreover, such investment is considered an important factor for enabling people to secure better quality jobs which, in turn, leads to greater social inclusion and cohesion. Therefore, policymakers in Bulgaria and Romania should address these issues more actively and create conditions that will promote and facilitate different forms of investment in human capital.

**Figure 15 Respondents who have taken an education or training course over the previous year, by type of training course and country group (%)**



Q.49: What kind of education or training course is/was it?  
 Source: EQS, 2003



# Household structure and family relations

The ageing population, low labour participation rates and decreasing birth rate are all important issues in the context of EU social policy debates. These issues seem to deeply affect the patterns of solidarity that define and underline the European social model. From the point of view of their objectives and concerns, national policies in Romania and Bulgaria are close to those of the EU: support for increasing the birth rate, as well as addressing the effects of ageing, are very much the focus of these countries' social policies.

Family is a core aspect of people's lives, contributing to their integration, socialisation and the level of support available. Over time, various patterns of household structures, from the extended family to the nuclear family, have had an impact on different aspects of society including the sphere of childrearing, gender equality, participation in work, and social insurance. This chapter explores the different household structures that are visible in Romania and Bulgaria, along with the household division of labour and the role of the family in providing support to its family members.

## Demographic changes

Bulgaria and Romania are considered as having a more traditional culture than is found in the six low income EU countries and the EU25 (Ester et al, 1994; Inglehart, 1997; Sztompka, 1993). This is also reflected in the patterns of family formation in these two countries. For example, the average age at which people get married is around three years younger than that in western European countries (Eurostat, 2005). At the same time, more multi-generation households are found in the two acceding countries, and the household division of labour is more traditional, with women having more of the responsibilities (Voicu and Voicu, 2002; Saraceno and Olagnero, 2004).

However, recent trends indicate that society in Bulgaria and Romania is beginning to change quite rapidly. Transition has not only brought about the market economy and democratisation, but also deep structural changes in patterns of family formation. The age at which people get married and have their first child has increased, for example, particularly among the higher educated groups. As a result, the marriage rate has decreased, while the divorce rates remain constant, in turn leading to a higher level of cohabitation and extra-marital births in these countries (Popescu, 2003).

Fertility rates, which remained almost constant during the 1980s, decreased sharply between 1990 and 2003 by 32% in Bulgaria and by 31% in Romania (Eurostat), now standing at a rate of 1.29% in both countries. A similar decrease in fertility rates has also been witnessed in the other former communist countries. In the EU25, the decrease in birth rates has been much lower, falling by just 4% and resulting in an average fertility rate of 1.5%. Among the many reasons for the sharp decline in birth rates in Bulgaria and Romania are better access to contraception, the legalisation of abortion, changing family patterns (including fewer children), and the relatively high level of international migration affecting mainly those in the 24–35 year age group.

During the transition period, the demographic structure of the population has also changed dramatically in both acceding countries. Between 1990 and 2003, for example, the elderly population (aged 65 years and over) increased by 38% in Romania (from 10.3% to 14.2% of the total population) and by 31% in Bulgaria (from 13% to 17% of the total population). During the same period, the elderly population increased by 24% in the six low income EU countries and by 17% in the EU25.

The ageing of the population – associated with increased migration and low labour market participation – poses important challenges for the social insurance and pension systems of the two acceding countries, particularly since the ratio between the active and inactive population has fallen considerably. Moreover, the rapid change in demographics and the changing role of the family raises important issues with regard to care of elderly people.

### **Household size and structure**

The average size of households in Romania (2.92 persons) is higher than that in most of the European countries studied. Bulgarian households (2.69 persons) are therefore, on average, smaller than those in Romania. Although the latter figure is closer to the average household size in the six low income Member States (2.71 persons), it is still considerably higher than the EU25 average (2.46 persons). In both of the acceding countries, fewer single-person households exist and the percentage of larger households is higher than in the rest of Europe.

In both Romania and Bulgaria, as well as in the EU25, married couples with children (nuclear families) represent about one third of all households. Married couples without children represent 21% of households in Bulgaria and 26% of households in Romania. These figures are significantly above the average of 17% in the six low income Member States, but below that of the EU25 (27%). As expected, the traditional extended family (three-generation household) is more common in the two accession countries. In Bulgaria and Romania, as well as in the six low income EU countries, these larger households account for about one tenth of all households, compared with an average of 3% of households in the EU25. One explanation for this is related to the financial difficulties faced by many young people and young couples – for example due to unemployment, low salaries, and the high cost of housing; as a result, many of them postpone leaving the parental home, even after having children.

**Table 10 Composition of household, by country group (%)**

|  | <b>Bulgaria</b> | <b>Romania</b> | <b>EU6 Low</b> | <b>EU25</b> |
|--|-----------------|----------------|----------------|-------------|
| Single                                       | 15              | 14             | 13             | 23          |
| Single parent with child(ren) < 16 years     | 1               | 2              | 2              | 3           |
| Couple                                       | 21              | 26             | 17             | 27          |
| Couple with 1 or 2 children < 16 years       | 15              | 12             | 18             | 16          |
| Couple with 3+ children < 16 years           | 0.1             | 1              | 4              | 2           |
| Couple with all child(ren) ≥ 16 years        | 18              | 20             | 21             | 16          |
| Three generations living together            | 13              | 7              | 10             | 3           |
| Single parent with all child(ren) ≥ 16 years | 6               | 5              | 8              | 6           |
| Above types plus other persons               | 12              | 14             | 9              | 5           |

Source: EQLS, 2003

A noteworthy characteristic of more traditional cultures such as that of Bulgaria and Romania is that people tend to marry at a younger age than those in western European countries. This is reflected in the distribution of single-person households in both Bulgaria and Romania (Table 11), which indicates a somewhat lower proportion of persons aged 18–34 years living alone. A regular pattern in these countries, as well as in the six low income Member States, is that people get married at a younger age, usually without spending a period of time living separately from the parents beforehand.

Furthermore, in comparison with western European countries, fewer people in the 25–34 year age group tend to leave the parental home and to live alone.

**Table 11 Age composition of single-person households, by country group (%)**

|          | 18–24 years | 25–34 years | 35–49 years | 50–64 years | 65+ years |
|----------|-------------|-------------|-------------|-------------|-----------|
| Bulgaria | 10          | 6           | 10          | 22          | 52        |
| Romania  | 11          | 10          | 13          | 23          | 42        |
| EU6 Low  | 4           | 7           | 16          | 27          | 46        |
| EU25     | 9           | 16          | 19          | 19          | 37        |

*Note:* Only the single-person households were considered.

*Source:* EQLS, 2003

In terms of the profile of single-person households in Romania and Bulgaria, similar to the trend in other European countries, younger people aged 18–34 years who live alone are more frequently better educated and living in urban areas. A significant proportion of older people aged 65 years and over also live alone: about one third of elderly people in Bulgaria and Romania live in single-person households, usually as a result of the death of their spouse. A higher life expectancy among women largely explains the reason why about half of elderly women live alone, compared with 25% of men in the same age group in Bulgaria and around 20% of elderly men in Romania.

### Housework and care responsibilities

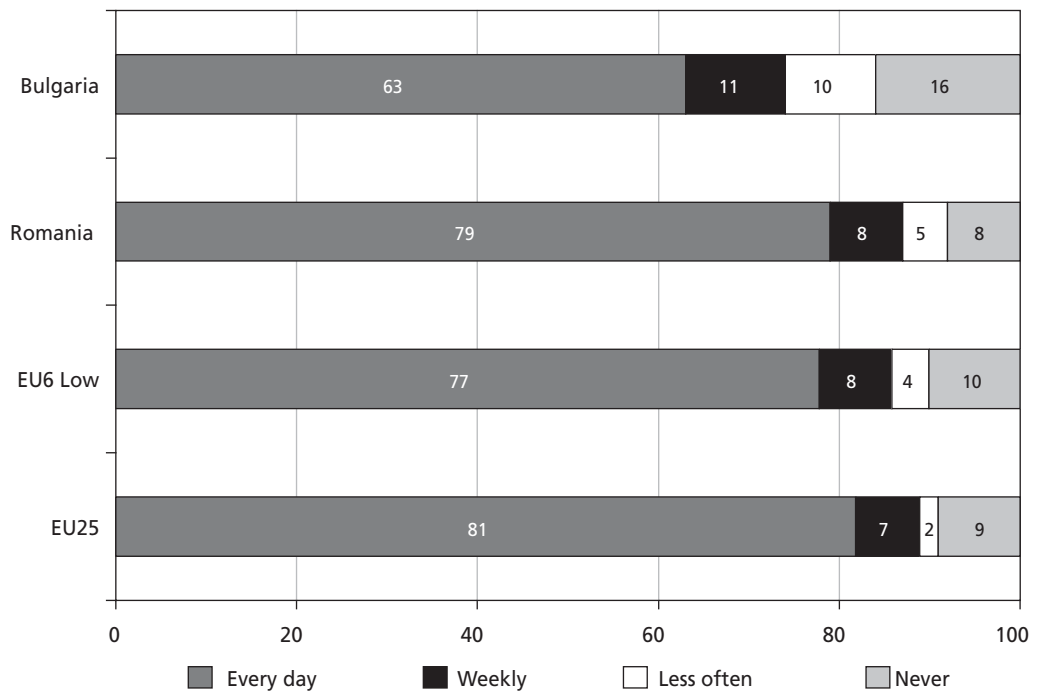
Most of the respondents in the EQLS reported partaking in daily housework activities. However, some significant variations emerge in this respect across Europe. In Romania, 82% of the respondents indicated that they engaged in daily housework, which is significantly higher than the respective figures for Bulgaria (74%) and the EU25 (68%), although somewhat similar to the average figure for the six low income Member States (80%).

Childcare is another important family task most frequently reported by respondents in Romania, 79% of whom engage in daily childcare duties (Figure 16). In Bulgaria, this percentage is considerably lower, at 63%. The disparity between the two acceding countries in this respect might be explained by the different maternity and family benefit systems in each country. According to the EQLS findings in 2003, such benefits were more widespread and generous in Romania, including, for instance, a specific indemnity for care of a sick child. These measures may have encouraged more Romanians to care for children in the home. In Bulgaria, the benefits depended more on social insurance contributions (maternity leave) and were means tested (children's benefit). In addition, childcare services and facilities are more developed in Bulgaria, which might lead to a lower involvement in childcare duties within the household.

Caring for elderly and disabled people is a relatively common activity among householders in Bulgaria and Romania: 14% and 18%, respectively, of the respondents who live in a household with at least one older person (aged 65 years and over) reported that they care for an elderly or disabled person on a daily basis. These figures are marginally higher than the average figures for the six low income Member States (13%) and for the EU25 (9%). It is not unusual for people to combine a number of household tasks. For instance, many of the respondents from households with older family members engage in daily housework, as well as caring for children and elderly family members each

day. Such a pattern generally reflects the greater presence of multi-generational households in the two acceding countries. Family networks appear to be strong in these countries, partially compensating for the weaknesses of the social services.

**Figure 16 Childcare in households with at least one child younger than 16 years of age, by country group (%)**



Q.37a: How often are you involved in caring for and educating children, outside of paid work: every day; three or four times a week; once or twice a week; once or twice a month; less often; never?

Note: Only the respondents from households in which there is at least one child younger than 16 years of age are considered here.

Source: EQLS, 2003

In relation to the average number of hours devoted to the respective household activities, Romanians spend the longest time engaged in housework, at an average of 7.1 hours per day. This is much higher than the average number of hours spent by Bulgarians on daily housework (3.7 hours) and than the average figure for the EU25 (3.2 hours) and the six low income EU countries (4.2 hours).

With regard to the number of hours spent on childcare, Romania once again has one of the highest scores in this respect, with an average of 5.1 hours a day among those responsible for this task. This contrasts with an average of 4.0 hours in Bulgaria – one of the lowest rates in Europe. In relation to care of elderly or disabled people, the average time spent in both of the acceding countries is higher than that of the EU25. However, when considering those whose only daily household responsibility involves caring for elderly or disabled people, then the average number of hours is lower than that of the EU25. These findings hold true for households that include elderly members and also for those without elderly members living in their own household. This difference is probably related to the higher involvement of Bulgarians and Romanians in the care of elderly or disabled people: if more people are engaged in these activities, then the average time spent by each family member may be smaller.

As Saraceno and Olagnero (2004) observed, caring duties and housework are mainly the responsibility of women. Older people are also more involved in childcare duties in the two acceding countries compared with other groups, although children remain mainly the responsibility of the parents. In all of the countries and country groups, people from rural areas more frequently reported that they engaged in each of the three caring and housework activities. Those with lower incomes are also more involved in housework and caring activities than people with higher incomes. The same is true for people who are active (working or studying) compared with retired or unemployed people.

### Patterns of support within the family

Throughout Europe, the family is one of the most important sources of support, for example when people face physical or mental illness, financial difficulties, or feel isolated or depressed. This is particularly evident in Bulgaria and Romania, where the family is considered the main source of support in cases of illness or when family members need advice or feel depressed (Table 12). However, people's expectations of the family are lower in the acceding countries when it comes to accessing financial support; in this instance, people seem to more frequently seek financial help outside of the family unit. One likely reason for this may be the poor financial capacity of the family to provide such support. Moreover, the percentage of people who indicate that they can borrow money urgently from someone is also relatively low in Bulgaria and Romania, which reflects the lower income levels and more difficult material position of people in these two countries. Nonetheless, it should be noted that the amount of money specified in the EQLS (€500 in central and eastern European (CEE) countries and €1,000 in western European countries), which respondents were asked if they could borrow, would be considered a large amount of money in Bulgaria and Romania.

**Table 12** Reasons given why family members are an important source of support, by country group (%)

|          | Family is most important when I...     |  |   |  |
|----------|--|--|---|--|
|          | ...need help around the house when ill | ...need advice about a serious personal or family matter | ...am feeling a bit depressed and want someone to talk to | ...need to urgently raise €1,000 (or €500 in CEE countries) to face an emergency |
| Bulgaria | 83                                     | 62   | 49  | 35   |
| Romania  | 86                                     | 79   | 67  | 44   |
| EU6 Low  | 90                                     | 77   | 54  | 61   |
| EU25     | 82                                     | 67   | 52  | 69   |

Q.36: From whom would you get support in each of the following situations? For each situation, choose the most important person: 1) if you needed help around the house when ill; 2) if you needed advice about a serious personal or family matter; 3) if you were feeling a bit depressed and wanted someone to talk to; 4) if you needed to urgently raise €1,000 (or €500 in the acceding countries and NMS) to face an emergency.

Categories: a family member; work colleagues; friends; neighbours; someone else; nobody.

Source: EQLS, 2003

Generally, people who are on higher incomes, better educated, live in urban areas, and younger tend to rely more on friends and other connections than on family members. Factors such as lifestyle, personal values and social capital may play a significant role in this instance. This finding is consistent with literature which describes the increasing importance of friends in such societies (see



Giddens, 1992; Pahl, 2003). Nonetheless, the family still remains the main point of support for the majority of people, in particular for people who are less well educated, have poor incomes, are older and live in rural areas. These observations are evident in all of the countries under consideration, irrespective of some cross-country differences in terms of the level of support received from family or others. Differences between countries may be attributed to the same factors already mentioned – lifestyle, culture, social capital, income and education – which together are indicators of the social development of a society.

The relative importance of family as a source of support in Bulgaria and Romania can also be attributed to the patterns of sociability in the respective societies. Data from the European Values Survey (EVS)/World Values Survey (WVS) 1999–2001<sup>8</sup> provide some information in this respect. Romania is characterised by a very low level of ‘outside family sociability’, with only about a third of people declaring that they meet their friends on a weekly basis, which is the lowest proportion in Europe. In Bulgaria, 58% of those interviewed indicated that they meet their friends every week. The same survey reveals that people in the former communist countries spend less time with their friends, in comparison with the rest of Europe. Thus, the reliance on family of people living in Bulgaria and Romania may be partly explained by their developing patterns of social relations: the pattern in Bulgaria lies somewhere in between that of the southern and former communist Member States, while in Romania it is much closer to that of the former communist countries. As Table 12 implies, Romanians maintain less contact with people outside of the family and rely much more on the support of the latter. When in need, Bulgarians rely somewhat more on the support of friends, colleagues and neighbours; however, family still remains the most important source of support in this country, as it does throughout Europe.

### Family and society

When assessing the importance of the family in society, data from the Eurobarometer survey (Eurobarometer 56.1, 2002) provide useful information. The survey asked respondents a range of questions on how they perceive different roles of the family in society and what issues they think the government should prioritise in its family policy (Table 13).

**Table 13 Perceptions of role of family in society, by country group (%)**

|   | Bulgaria | Romania | EU6 Low | EU25 |
|---|----------|---------|---------|------|
| Bringing up and educating children                            | 93       | 89      | 92      | 77   |
| Looking after the health and well-being of all family members | 86       | 76      | 85      | 64   |
| Providing love and affection to all family members            | 81       | 75      | 84      | 65   |
| Providing moral support to family members                     | 80       | 68      | 74      | 48   |
| Taking care of elderly family members                         | 78       | 69      | 79      | 47   |
| Maintaining cultural and moral values                         | 73       | 63      | 76      | 55   |
| Contributing to the economy                                   | 55       | 51      | 56      | 37   |

Q.17a: The respondents were asked to specify which from the above list represents the role(s) of the family in society. Multiple choices were allowed.

Source: Eurobarometer, 2002.

<sup>8</sup> The EVS is a periodic survey, based on national representative samples, which gathers information about social values. The WVS extends the survey to a more global level. The first wave of the survey was conducted in 1980, the second in 1990–1993, then in 1995–1997, and subsequently in 1999–2001. The 1999–2001 wave included 81 societies from all over the world.

In Bulgaria and Romania, the largest percentage of respondents identified 'bringing up and educating children' as being the most important role of the family in society (Table 13). This also holds true for respondents from the six low income EU countries and from the EU25. At least three-quarters of respondents in the two acceding countries and two-thirds of respondents in the EU25 identified 'looking after the health and well-being of all family members' as being an important role of family in society. Also, a large majority of respondents in Bulgaria and Romania considered the roles of 'providing love and affection to all family members', 'providing moral support to family members' and 'taking care of elderly family members' as being highly important; these roles were not as frequently cited in the western European countries.

**Table 14 Issues that government should prioritise in field of family policy, by country group (%)**

|   | Bulgaria | Romania | EU6 Low | EU25 |
|---|----------|---------|---------|------|
| Children's allowance                            | 56       | 53      | 45      | 35   |
| Level of benefits for newborn babies            | 61       | 42      | 43      | 22   |
| Cost of educating children                      | 25       | 42      | 42      | 34   |
| Fight against unemployment                      | 49       | 32      | 48      | 44   |
| Tax advantages for families with children       | 19       | 34      | 39      | 32   |
| Childcare arrangements                          | 20       | 27      | 21      | 29   |
| Duration of maternity leave                     | 29       | 23      | 20      | 21   |
| Availability of suitable accommodation          | 23       | 22      | 22      | 28   |
| Flexible working hours                          | 9        | 10      | 9       | 31   |
| Availability and affordability of contraception | 1        | 2       | 3       | 3    |

Q.17a: The respondents were asked to specify which from the above list represent the most important three issues that the government should prioritise.

Source: Eurobarometer, 2002

When asked about the issues that should be prioritised by the government in the field of family policy (Table 14), Bulgarians and Romanians provided similar answers to those of the respondents in the six low income Member States: increasing the availability and level of benefits for children gained the highest score among these countries, followed by reducing the cost of education for children (Romania) and combating unemployment (Bulgaria). Low income levels and the relatively large incidence of poverty and unemployment seem to have an impact on the issues prioritised by Bulgarians and Romanians in this context. Respondents in the old Member States displayed a somewhat different point of view, emphasising the fight against unemployment and the availability of flexible working schedules.



A higher level of aspirations in modern society today has meant that people are now more concerned about balancing their working lives with their family and social lives. European policy in the field of employment reflects this trend. The EU Social Policy Agenda, as well as the EU Employment Guidelines, emphasise the need to ensure the compatibility of work, on the one hand, and family and social life, on the other.

The European social model assumes the availability of certain levels of support within the family. As mentioned in the previous chapter, current trends in family formation as well as demographic ageing are beginning to challenge this model, putting more pressure on each individual member due to the diminishing size of families. This implies more tension between family life and work life, at a time when public opinion and EU policy also emphasise the importance of higher labour market participation, particularly among women. In this context, childcare services, parental leave, part-time work, facilities for elderly people and flexible work schedules are all seen as important policy tools. Bulgaria and Romania are also increasingly being confronted with similar challenges, and their national social policies should reflect such issues.

## Working time

In the former communist regimes, work was officially labelled as a core value of society. In the late 1980s, people in central and eastern Europe worked a much longer working week than those in western European countries. In Romania, for instance, workers' only day off at the weekend was on Sundays. Although the employees spent, on average, more time at work than their counterparts in the rest of the Europe, work productivity was low as a result of the mandatory policy of full employment (letting all do some work) and old technology. At the same time, the employers acted as welfare providers (Deacon, 1992; Zamfir, 1999) through extensive support systems for families, with generous provisions for childrearing.

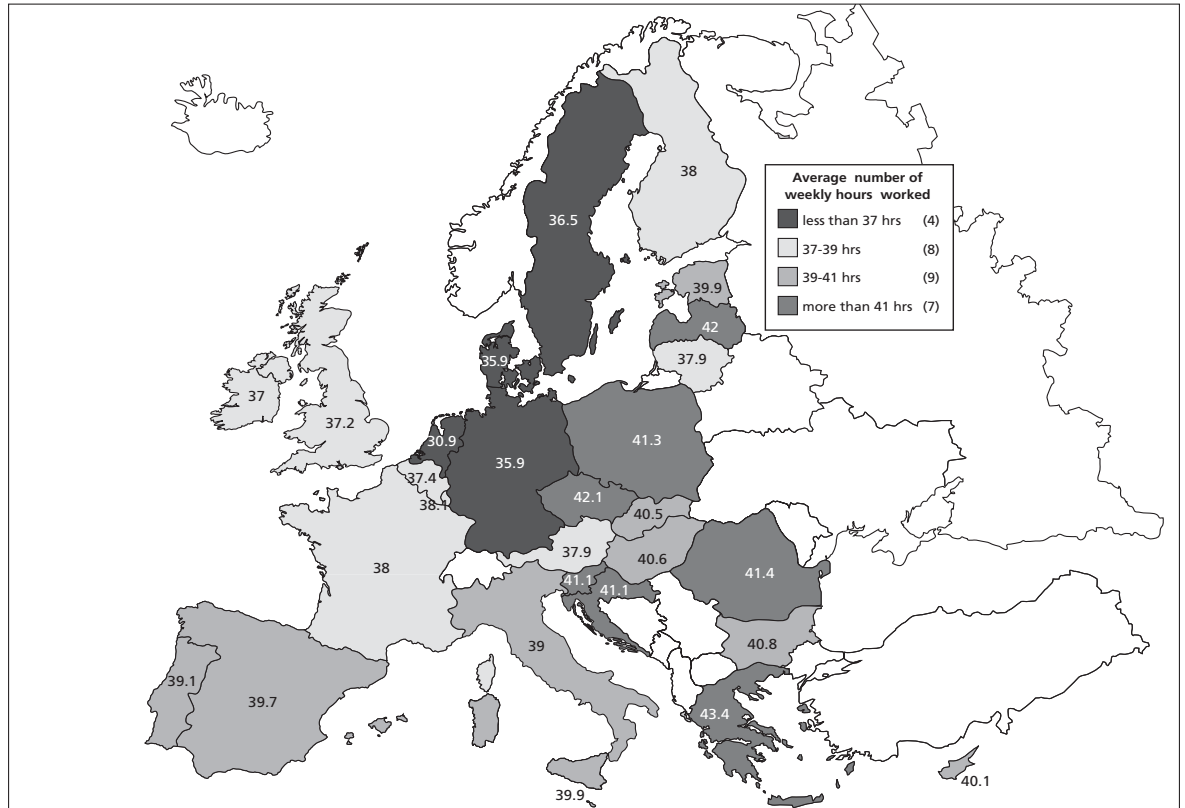
Since the transition of the former communist countries to the market economy, the number of working hours has not fallen very much. Privatisation in Romania and Bulgaria, similar to the other former communist societies, involved engaging state employees as part-time workers in the newly established private companies (Chavdarova, 1994; Neef and Stănculescu, 1999). However, having an additional (parallel) job has tended to offset the effect of the reduced working week of five days; as a result, the average number of working hours of employees in these countries is still higher than that of employees in most of the other European countries.

The results of the European Labour Force Survey (ELFS) reflect this reality (Figure 17). With an average of 41.4 working hours per week in the main job, Romania ranks highest among the European countries in terms of the most number of hours worked each week. Bulgarians also work comparatively long hours (40.8 hours per week), particularly when compared with the Scandinavian and Benelux (Belgium, the Netherlands and Luxembourg) countries. Both of the acceding countries are well above the average for the EU25 (38 hours per week) in this respect.

The sectoral structure of employment can offer some explanations for the long working hours in the two acceding countries. As already outlined, in Romania, a large proportion of total employment (34%) is found in the agricultural sector – a sector which demands long working hours (on average up to 59 hours a week). In Bulgaria, the agricultural sector also accounts for a relatively high

proportion of employment (10%), where the average number of working hours is the same as that in Romania.

**Figure 17 Average number of hours worked in main job**



Note: The ELFS does not provide data for the countries coloured in white.

Source: ELFS, 2003, 2<sup>nd</sup> quarter (Eurostat)

In terms of differences between the average number of hours worked by men and women, a high variation exists across Europe. According to the ELFS, in Romania, men work on average 1.8 hours longer than women do in their main job. In Bulgaria, the difference is smaller at just one hour. Compared with the other countries under consideration, the difference between the number of hours worked by men and women is therefore smallest in the two acceding countries; only in Slovakia is a similar pattern (1.8 hours' difference) observed. Meanwhile, in the Nordic countries, it is found that women work between 4.3 and 5.6 hours less than men do each week. This difference is as high as 12 hours in the Netherlands and 11.5 hours in the UK. Overall, the average difference between the number of hours worked by men and women is 7.4 hours in the EU25 and 4.2 hours in the six low income EU countries.

In Bulgaria and Romania, as well as in some of the six low income Member States, economic need (low level of household income) along with inflexible working time arrangements are the major reasons for women's longer working week. In particular, the proportion of women who work more than 48 hours a week in these countries is closest to the respective proportion of men who work the same number of hours. Conversely, in the EU25, twice as many men as women work such long working weeks.

Rural–urban differences in the number of weekly hours worked are not extensive in the case of Bulgaria. In Romania, the difference is more significant, as people in rural areas spend on average 4.9 more hours at work each week than those living in urban areas. Once again, this may be attributed to the fact that a larger proportion of rural people work in the more time-consuming agricultural sector.

### Difficulties in harmonising work, family and social life

The aforementioned findings in relation to the longer working hours in Bulgaria and Romania lead to the hypothesis that employees in the two accession countries, particularly in Romania, are likely to experience greater difficulties in reconciling work and family life, since they spend on average more time working. The EQLS data confirm these expectations (Table 15).

**Table 15 Employed persons citing difficulties reconciling work and family life several times a week (%)**

|          | Too tired to do household jobs | Difficulties in fulfilling family responsibilities | Difficulties in concentrating at work |
|----------|--------------------------------|--|---------------------------------------|
| Bulgaria | 37                             | 20   | 6                                     |
| Romania  | 36                             | 17   | 3                                     |
| EU6 Low  | 30                             | 16   | 5                                     |
| EU25     | 23                             | 10   | 3                                     |

*Note:* Only the answers of employed respondents were considered.

Q.13: How often have you experienced each of the following during the last year: a) I have come home from work too tired to do some of the household jobs which need to be done; b) It has been difficult for me to fulfil my family responsibilities because of the amount of time I spend working; c) I have found it difficult to concentrate at work because of my family responsibilities? Categories for all questions are: several times a week, several times a month, several times a year, less often, never.

*Source:* EQLS, 2003

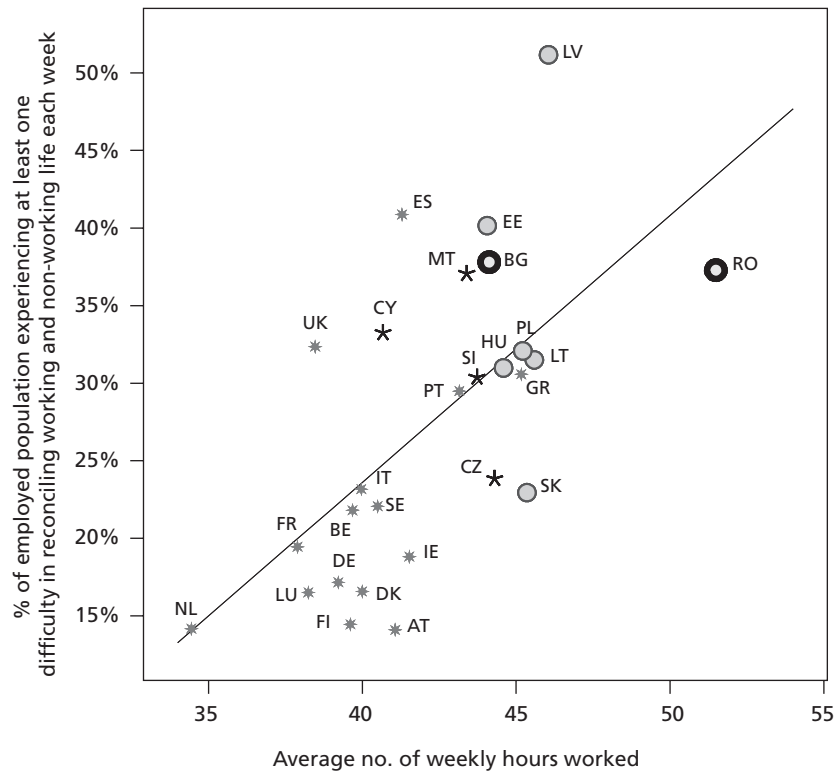
In comparison with people living in the six low income Member States and the EU25, Bulgarians and Romanians report more frequently that they are too tired to fulfil any household duties after they return home from work. They also complain to a higher degree than people in the EU25 about experiencing difficulties fulfilling family responsibilities. Moreover, Bulgarians complain more frequently than Romanians do about experiencing difficulties in concentrating at work. The EQLS also indicates that people who cite at least one of the difficulties in harmonising their work and family life generally work longer hours than those not citing such problems. This difference is 3.6 more hours in Bulgaria and 7.0 more hours in Romania, compared with an average of 4.7 longer hours in the EU25 and 7.0 hours in the six low income Member States.

In Romania and Bulgaria, as well as in western European countries, women complain slightly more often than men about the fact that their busy schedule prevents them from fulfilling their domestic tasks. This is likely to be the result of the culturally determined division of labour within households, which generally puts more pressure on women and consequently causes more difficulties for them when trying to balance professional and family responsibilities.

People living in rural areas in the two acceding countries also tend to cite problems reconciling work and family slightly more often than those living in urban areas. Conversely, those living in rural areas in the six low income Member States and the EU25 report significantly fewer difficulties in

harmonising work and family life than people in urban areas. Although the differences are not always significant, it is interesting to note that, throughout Europe, those who are better educated and who have higher incomes cite more difficulties in balancing work and family life. This may be related to the fact that people in these categories are likely to have higher aspirations, a more active social life, and a less traditional division of labour within the household, with more women participating in the labour market. These factors tend to put more pressure on people's time.

**Figure 18 Relationship between working time (main and second job) and work-life balance, by country**



The index of experiencing difficulties considers three questions – Q.13: How often have you experienced each of the following during the last year: a) I have come home from work too tired to do some of the household jobs which need to be done; b) It has been difficult for me to fulfil my family responsibilities because of the amount of time I spend working; c) I have found it difficult to concentrate at work because of my family responsibilities? Categories for all questions are: several times a week, several times a month, several times a year, less often, never. Those respondents who answered ‘several times a week’ for at least one of the three choices were labelled as experiencing difficulties in work-life balance.

Concerning the hours worked, Q.7 and Q.10 were employed for computing the additive index:

Q.7: How many hours do/did you normally work per week (in your main job), including any paid or unpaid overtime? Q.10: About how many hours per week did you work in this additional job or business or in agriculture? Please give an average figure for the last four working weeks.

Source: EQLS, 2003 (authors' computations)

Age (life-cycle phase) also seems to have an influence on people's ability to reconcile work and family life. In Bulgaria, those in the 35–49 year age group more frequently report difficulties in balancing work and family life; in Romania, older employed persons also cite more problems in reconciling their professional and housework responsibilities. At the same time, fewer young people in Bulgaria report such difficulties compared with their counterparts in Romania.

## Time constraints

Given the comparatively high number of weekly working hours, along with the number of hours spent on housework and childcare, it is to be expected that Romanians have very little time for social contacts and leisure. The EQLS confirms this hypothesis, showing that a considerably large proportion of people living in Romania complain about having too little time for social contacts, personal hobbies and interests, participation in civic organisations, and even sleeping (Table 16). In fact, all of the figures for Romania concerning time constraints greatly exceed the European averages.

**Table 16 Perceived time constraints, by country group (%)**

|  | Percentage of people declaring that they have too little time for ... |           |                 |                             |          |  |
|--|---|-----------|-----------------|-----------------------------|----------|--|
|  | work  | relatives | social contacts | personal hobbies/ interests | sleeping | voluntary work or political activities |
| Bulgaria   | 1   | 22        | 51              | 56                          | 25       | 50                                     |
| Romania  | 6   | 28        | 56              | 67                          | 34       | 81                                     |
| EU6 Low  | 6   | 21        | 38              | 47                          | 24       | 50                                     |
| EU25   | 4   | 25        | 33              | 43                          | 26       | 45                                     |
| Country ranking according to percentage of those declaring that they have too little time for each of the above activities |   |           |                 |                             |          |  |
| Bulgaria   | 26  | 17        | 2               | 2                           | 17       | 11                                     |
| Romania  | 7   | 8         | 1               | 1                           | 1        | 1                                      |

Q.40: I am going to ask you about some areas of daily life in which you can spend your time. Could you tell me if you think you spend too much, too little or just about the right amount of time in each area: a) My paid job; b) Contact with family members; c) Other social contacts; d) Own hobbies and interests; e) Sleeping; f) Taking part in voluntary work or political activities.

Note: The surveyed countries were ranked in descending order according to the percentage of those declaring that they have too little time for each of the six abovementioned domains.

Source: EQLS, 2003

Bulgarians perceive time constraints to a somewhat lesser extent than Romanians do; nonetheless, they still rank highly in relation to the proportion of people who cite that they have too little time for social contacts and hobbies. Almost none of the respondents in Bulgaria complained about having too little time for work.

The pattern found in the two acceding countries correlates with that of a less productive society with a more traditional culture. Lower productivity implies more time spent on work tasks and lower pay levels, which appears to be the case in Bulgaria and Romania. Both of the acceding countries also appear to have more traditional sociability patterns compared with the older Member States (Inglehart, 1997). This implies less involvement in social activities outside of the family circle, fewer personal hobbies and interests, and a lower level of participation in and propensity for voluntary work and political activity.





Good health is essential for a proper quality of life, enabling people to freely pursue their goals, to live a full and satisfactory life, and to be active members of their society. In contrast, poor health can prevent people from engaging in activities and relationships, negatively impacting on their quality of life.

The significance of good health is largely acknowledged at European level, and is included as one of the major objectives of EU social policy. Although the organisation and funding of healthcare systems is the responsibility of each country, the EU supports a series of activities related to the concept of the 'health policy chain'. This concept encompasses a wide range of measures including the promotion of good health, preventive health measures, and access to medical treatment, care and rehabilitation; it also encourages the exchange of information and experience and the identification of best national practices in the field of healthcare and long-term care, as well as endorsing the creation of an integrated framework in which health policy is considered in relation to other policies (European Parliament, 2004). At European level, the common framework designed to support Member States in the reform of healthcare systems is founded on three guiding principles: accessibility of care for all people based on fairness and solidarity, high-quality care, and financial sustainability of the care system (European Commission, 2004).

EU enlargement brings to light the level of diversity among the individual Member States and the challenges in economic and social realms. Health and healthcare is one issue in particular that requires the attention of policymakers. Throughout Europe, the modernisation and development of the healthcare sector is focused on addressing the persistent inequalities in access to services, the inadequate quality of these services and their financial sustainability (EU Commission, 2004). However, the situation appears to be more critical in Bulgaria and Romania, where the quality of health services seems to have deteriorated considerably during the economic transition (Anderson, 2004). Even though some positive trends have been observed recently in these two countries, the circumstances of their healthcare still remain unfavourable, as is confirmed by some vital statistical data. For example, the average life expectancy in Bulgaria (72.4 years) and Romania (71.6 years) is quite low, particularly when compared with western countries like Sweden where the average life expectancy is 80.2 years and France where the average life expectancy stands at 79.4 years (Eurostat, 2005). It is also well below the average life expectancy in the six low income EU countries, with the exception of Latvia which has a lower life expectancy (70.8 years).

Other objective indicators also reveal relatively unfavourable results for the two acceding countries. In Romania, for example, the infant mortality rate is among the highest in Europe, at 16.7 deaths per 1,000 live births, followed by Bulgaria (12.3). Although the infant mortality rates have fallen considerably in both countries in recent years (in 1990, the infant mortality rate was 26.9 in Romania and 14.8 in Bulgaria), these figures are still alarming in comparison with the average rate for the EU25 (4.6), where the infant mortality rates range from 9.4 in Latvia to as low as 3.1 in Sweden (Eurostat, 2005).

In Bulgaria and Romania, similar to other former communist countries, the transition to a market economy has resulted in the introduction of better forms of medical treatment, including new drugs and techniques that were not previously available to people. This can be considered a positive development that has contributed to the improvement and modernisation of healthcare in the two countries. Nonetheless, factors such as transition to the free market, the opening up of borders and

the collapse of the old regime and control structures have led to greater exposure to new health hazards, such as aggressively advertised tobacco, junk food and new types of alcoholic beverages, along with the increased risk of motor vehicle accidents and exposure to sexually transmitted diseases (Alber and Kohler, 2004). Moreover, the restructuring of the healthcare system has brought about more problems and stresses as people try to cope with the major changes.

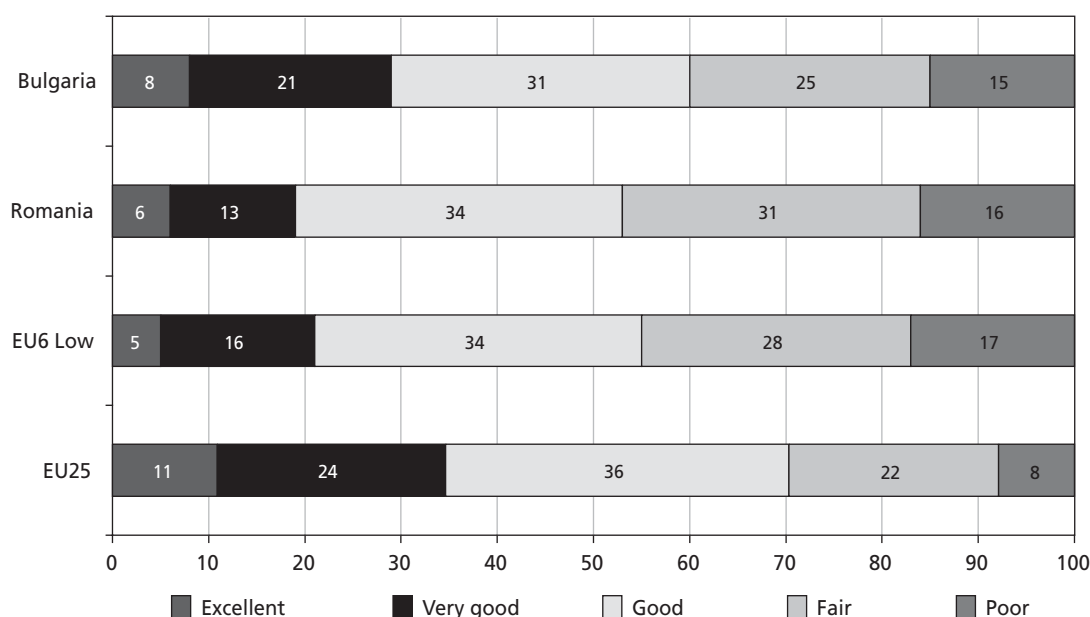
During transition, Bulgaria and Romania both embarked on major reforms of their healthcare systems. Prior to this, until the mid-1990s, the two countries had a centralised national healthcare system financed by general tax revenue and controlled by the state. Although this allowed for a widespread coverage, the quality of the health services was very low and sometimes rationed. In the late 1990s, Bulgaria and Romania adopted new social insurance schemes based on contributions and set up health insurance funds. Private practice was also introduced in parallel with the state-run system, providing higher quality services, but at a more expensive price.

Currently, the two countries are experiencing serious difficulties in generating adequate revenue to fund their healthcare system, since a significant proportion of the population are still not contributing to the system. As a result, the national healthcare systems in the two acceding countries are grossly under-financed, in turn leading to a poor quality of services which is failing to meet the needs of the population. In order to increase revenue, people are charged for many of the health services. Moreover, it is not always clear what types of services are covered by medical insurance and this is also subject to change. At the same time, informal payments by way of bribes are often made by clients to medical staff in public hospitals and health centres, in an attempt to access better treatment and quality of services. All of these issues represent critical problems for the healthcare systems of both countries, which need to be addressed through adequate policies.

### **Perceived health status**

In the EQLS, people's subjective evaluation of their health status is used to describe this important dimension of their quality of life. Accordingly, the EQLS survey asked respondents to define their health status as either 'excellent', 'very good', 'good' or 'poor'. Respondents were also asked if they had any longstanding illness or disability that limited their activities in any way. People's perceived health status and the self-reported prevalence of disability or chronic illness are widely used in research as reliable measures of health.

The EQLS results show that a relatively high proportion of people in Bulgaria and Romania evaluate their health status as being 'poor', at 15% and 16% respectively (Figure 19). Although these figures are close to and even marginally below the average figure for the six low income Member States (17%), they are still much higher than the EU25 average (8%). This gap mirrors the differences between the 27 countries in objective health indicators such as morbidity rates and life expectancy. When looking at the older Member States, Portugal is the only country with a higher proportion of people reporting a 'poor' health status (17%); among the six low income countries, a higher proportion of respondents than those in Bulgaria and Romania cite a poor health status in Lithuania, Poland (both at 19%) and Latvia (21%).

**Figure 19 Perceived health status, by country group (%)**

Q.43: In general, would you say your health is excellent, very good, good, fair or poor?

Source: EQLS, 2003

When taking the other subjective health indicator into account – namely, having a longstanding illness or disability – the outlook for the health status of Bulgarians and Romanians becomes even worse. A quarter of the respondents in these countries (26% in Bulgaria and 25% in Romania) reported having a longstanding illness or disability. Even though it is possible that not all of these people actually experience severe health problems (Grammenos, 2003), the data are nevertheless indicative of the health situation in both countries. Given the relatively high proportion of people who report having health problems that impede on having an active and independent life, the health systems of these two countries are likely to face serious challenges in the coming years.

**Table 17 Perceived health status, by sex, age and place of residence**

|          | Average total | Sex |       | Age         |           | Residence |       |
|----------|---------------|-----|-------|-------------|-----------|-----------|-------|
|          |               | Men | Women | 18–25 years | 65+ years | Urban     | Rural |
| Bulgaria | 2.8           | 3   | 2.7   | 3.6         | 1.9       | 3         | 2.6   |
| Romania  | 2.6           | 2.8 | 2.4   | 3.4         | 1.8       | 2.8       | 2.5   |
| EU6 Low  | 2.7           | 2.7 | 2.6   | 3.5         | 1.7       | 2.7       | 2.6   |
| EU25     | 3.1           | 3.2 | 3     | 3.7         | 2.5       | 3.1       | 3     |

Q.43: In general, would you say your health is excellent, very good, good, fair or poor?

Note: Average values were calculated using a reversed scale from one to five, where one means poor and five means excellent. Thus, the higher the average value, the better the evaluation of health status.

Source: EQLS, 2003 (average values)

In relation to gender differences in perceived health status, women perceive their health less favourably than men do in both of the acceding countries (Table 17). The EQLS data on longstanding illnesses or disability also support this finding: in Bulgaria, 30% of women report having a

longstanding illness or disability, compared with 22% of men; while in Romania, 28% of women, compared with 23% of men, report that this is the case. Previous research (see Alber and Kohler, 2004) has also shown that women usually report more frequently poor physical and mental health, have a higher prevalence of certain chronic illnesses and are more likely to be hospitalised for mental health conditions.

When evaluating the health status of Bulgarians and Romanians according to their place of residence, more people in rural areas report a less favourable health status than those living in urban areas (Table 17). Even though the disparity between people living in rural and urban areas is not particularly high in this respect, it is nevertheless indicative of the likelihood of a gap in the quality of health services between the two settings. Given that comprehensive and sophisticated healthcare is mainly concentrated in urban regions, primary care is usually the only type of healthcare service available in most rural areas in these two countries.

As expected, a large proportion of people aged over 65 years report having a longstanding illness or disability which limits their activity (53% in Bulgaria and 52% in Romania). Old age generally raises specific challenges for health systems, as elderly people usually require more healthcare services than younger or middle-aged people do due to a higher incidence of serious illnesses among this age group (European Commission, 2003). As demographic ageing is increasingly becoming an issue in Bulgaria and Romania, along with all of the other European countries, it is expected that healthcare for the elderly population will receive specific attention in these countries' health policies.

**Table 18 Perceived health status, by level of education and income, and employment status**

|          | Average total | Education     |                | Income          |                  | Employment status |            |         |
|----------|---------------|---------------|----------------|-----------------|------------------|-------------------|------------|---------|
|          |               | Low education | High education | Lowest quartile | Highest quartile | Employed          | Unemployed | Retired |
| Bulgaria | 2.8           | 2.2           | 3              | 2.4             | 3.2              | 3.3               | 3.1        | 2       |
| Romania  | 2.6           | 2.1           | 3.1            | 2.4             | 2.9              | 3                 | 2.7        | 1.9     |
| EU6 Low  | 2.7           | 2.1           | 3              | 2.6             | 2.9              | 3                 | 2.8        | 1.8     |
| EU25     | 3.1           | 2.8           | 3.4            | 2.9             | 3.3              | 3.4               | 3.1        | 2.4     |

Q.43: In general, would you say your health is excellent, very good, good, fair or poor?

Note: Average values were calculated using a reversed scale from one to five, where one means poor and five means excellent. The higher the average value, the better the evaluation of health status.

Source: EQLS, 2003 (average values)

Disparities in people's perceived health status can also be found among those with different levels of education. Once again, this disparity is on average greater in Bulgaria, Romania and the six low income Member States than in the EU25 (Table 18). Moreover, the self-reported incidence of a longstanding illness or disability is higher among lower educated people. In Bulgaria and Romania, 45% and 40%, respectively, of people with a primary education reported such health problems, compared with only 23% and 14% of those with a university degree.

The link between income levels and health has proved to be quite strong in the majority of European countries, particularly so in the lower income countries (Alber and Kohler, 2004). Overall, people in the highest income quartile report a better health status than those in the lowest quartile; this pattern

is most marked in Bulgaria (Table 18). Such a scenario also holds true in relation to the self-reporting of a longstanding illness or disability, with 36% of Bulgarians in the lowest income quartile declaring that they have a longstanding illness or disability, compared with only 12% of those in the highest income quartile. In Romania, 31% of people in the lowest income quartile, compared with 13% in the highest income quartile, report that this is the case.

The link between employment status and health is also significant, with labour market exclusion increasing the risk of poor health. This pattern is found in almost all of the countries studied in relation to the two health indicators – perceived health status and the self-reporting of a longstanding illness or disability. The causality between health and labour market exclusion can work both ways, with unemployment contributing to a poor health status and with a poor health status preventing people from having an active working life (Anderson, 2004).

### Satisfaction with health

The subjective indicator ‘satisfaction with health’ can be regarded as an output of the objective health conditions, the individual’s health status, and their own expectations with regard to their personal health. In the EQLS, respondents were asked to rate their satisfaction with their own health on a scale of one to 10, where one means very dissatisfied and 10 means very satisfied. Based on this measurement, the average score for satisfaction with health was 7.4 in the EU25, with the individual country figures ranging from 6.0 in Latvia to as high as 8.2 in Denmark and 8.1 in Ireland and Cyprus. In Romania, the average rating of 7.3 was closest to the EU25 average. In Bulgaria, the average level of health satisfaction stood at 6.5, which was closer to the average of the six low income Member States of 6.8.

Looking at the variation in health satisfaction according to socio-demographic variables reveals further disparities in people’s subjective assessment of their health. Men and women differ significantly in their level of health satisfaction in the two acceding countries: in Bulgaria, the average value for men was 6.9 compared with 6.1 for women, while in Romania the figures were 7.7 and 6.9 respectively. The difference between the sexes in this respect is less considerable in the six low income EU countries and almost insignificant in the EU25. It is possible that the more traditional lifestyle of women in the two acceding countries, where they have more responsibilities for housework, childcare and care of elderly people, may have an impact on women’s health. Moreover, the lack of services and facilities capable of relieving women of some of their many tasks may also contribute to their poorer health status and consequently to their lower level of satisfaction with health.

Health satisfaction also varies somewhat according to employment status. In Bulgaria, the average level of health satisfaction among employed people was 7.4, compared with 7.2 among unemployed people and 4.4 among retired people. In Romania, the respective figures ranged from 8.1 in the case of employed people to 7.4 for unemployed people and 5.8 for retired people. The latter group consists of elderly people who often have health problems and are therefore more likely to be less satisfied with their health.

Lower educated people are also less satisfied with their health – a pattern which can be found in all of the countries and country groups. In Bulgaria, the average level of health satisfaction ranges from 5.0 among lower educated people to 6.9 among those who are highly educated; in Romania, the

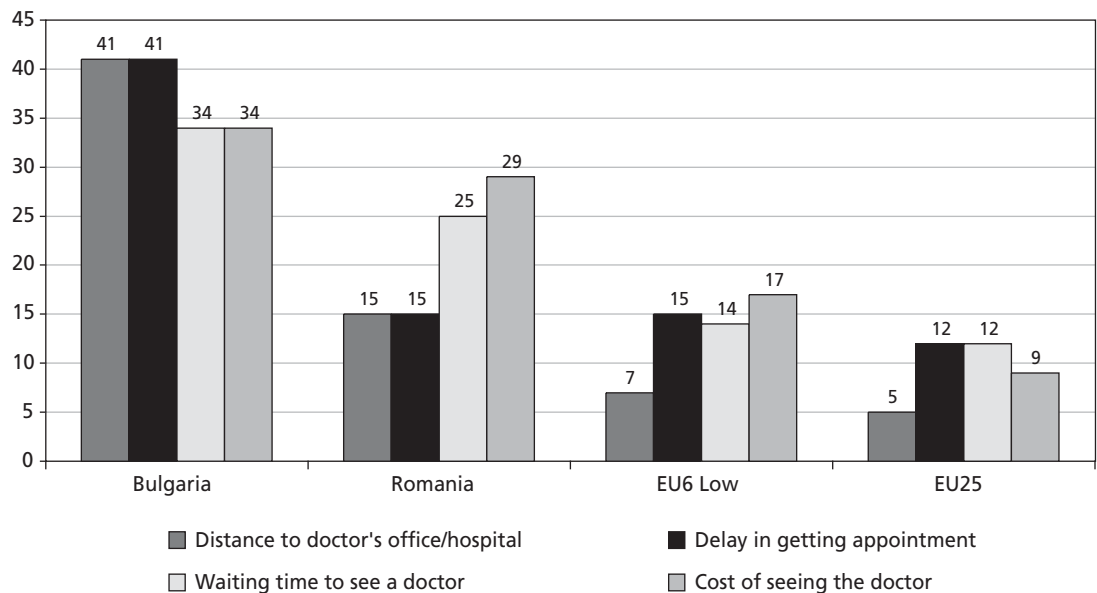
respective values range from 6.1 to 8.0, while in the EU25, an average score of 6.7 and 7.9 was recorded among lower and higher educated people, respectively. Level of education is related to health in many ways. In general, more highly educated people have a better chance of securing a good quality job, along with better working conditions, good pay and a higher standard of living. They also tend to be more aware of the various health risks, are more inclined to adopt healthy lifestyles and at the same time have better means for looking after their health. This underlines the potential importance that specific educational programmes can fulfil in improving people's health status in the respective countries.

People's level of satisfaction with their personal health also varies according to place of residence: those living in urban areas display, on average, a higher level of satisfaction with their health (6.8 in Bulgaria and 7.5 in Romania) than those living in rural areas (6.1 in Bulgaria and 7.1 in Romania).

### Access to health services

In the EQLS, a number of questions were designed to assess the accessibility of health services in each country. Accordingly, respondents were asked to rate four specific obstacles preventing or delaying their access to a doctor: distance; delay in getting an appointment; waiting time; and cost. Such information is essential for the evaluation of medical service provision and for policy development (Anderson, 2004).

**Figure 20 Respondents reporting 'very difficult' access to medical practitioner, by country group (%)**



Q.45: On the last occasion you needed to see a doctor or medical specialist, to what extent did each of the following factors make it difficult for you to do so: distance to doctor's surgery/hospital/medical centre; delay in getting an appointment; waiting time to see a doctor on day of appointment; cost of seeing the doctor. Categories of responses were: very difficult; a little difficult; not at all difficult.

Source: EQLS, 2003

Overall, people in Bulgaria report the highest number of difficulties in terms of accessing a doctor in comparison with the other countries (Figure 20). The most frequently reported problems concerning

access to a doctor in Bulgaria are distance to the doctor's surgery and the delay in getting an appointment; 41% of those who needed medical services reported finding it 'very difficult' to access medical care in relation to these two aspects. A high proportion of people in Bulgaria also complain about the length of waiting time required to see a doctor and the cost of medical consultations and check-ups. It is possible that the ongoing restructuring of the country's healthcare system, which involved the closure of economically inefficient medical establishments, including hospitals, has made it extremely difficult for people to access health services in Bulgaria. Moreover, general practitioners in private practice are often overloaded with work, thus making the availability of appointments with patients more difficult in this country.

In Romania, people complain most often about the cost of seeing a doctor (29%) and about the waiting time required to see a doctor (25%). This reflects the problems that are particular to this country's healthcare system, namely the lack of funding which in turn places the burden of some of the medical care costs on a less affluent population, either through means of charges for services or through informal payments made to medical personnel.

In relation to difficulties regarding distance to a doctor's surgery and getting an appointment, 15% of the respondents in Romania reported problems in these two areas – which is much lower than the respective figure for Bulgaria (41%). This mirrors the fact that there is a high spread of medical services throughout Romania, albeit usually in the form of primary medical care. Moreover, people in this country usually do not need to make an appointment and can see their family doctor without prior arrangement; generally, only those who wish to see a specialist are required to make an appointment beforehand, so problems are more likely to be reported in this regard.

While a relatively large proportion of people in Bulgaria and Romania have considerable difficulties in accessing health services, some groups are more disadvantaged than others in this respect. In Romania, lower educated people complain more frequently about finding it 'very difficult' to access doctors' services because of distance to the surgery (28%), compared with those with a higher education (5%). This may be indicative of a higher concentration of lower educated people in areas with less access to medical services, such as rural areas or peripheral towns. People with lower levels of education also report more difficulties in getting an appointment (18%) and in meeting the cost of services (32%), compared with those who are more highly educated, of whom only 5% report considerable difficulties in getting an appointment while 20% cite difficulties in meeting medical costs.

Romanians with lower incomes also complain more about accessing doctors' services, compared with those on higher incomes: 25% of those in the lowest income quartile complain about distance to a doctor's surgery, compared with only 7% of those in the highest income quartile. Less affluent people in Romania also find it very difficult to meet the cost of medical services: 41% of those in the bottom income quartile complain about the high medical costs in comparison with 17% of those in the highest income quartile. Less significant differences emerge regarding the delay in getting an appointment and in relation to the length of waiting time required to see a doctor.

In Bulgaria, meanwhile, the correlation between level of education or income and access to medical services is not as strong as in Romania. This could be attributed to the generally high rate of complaints about access to medical services across all categories in Bulgaria. However, some

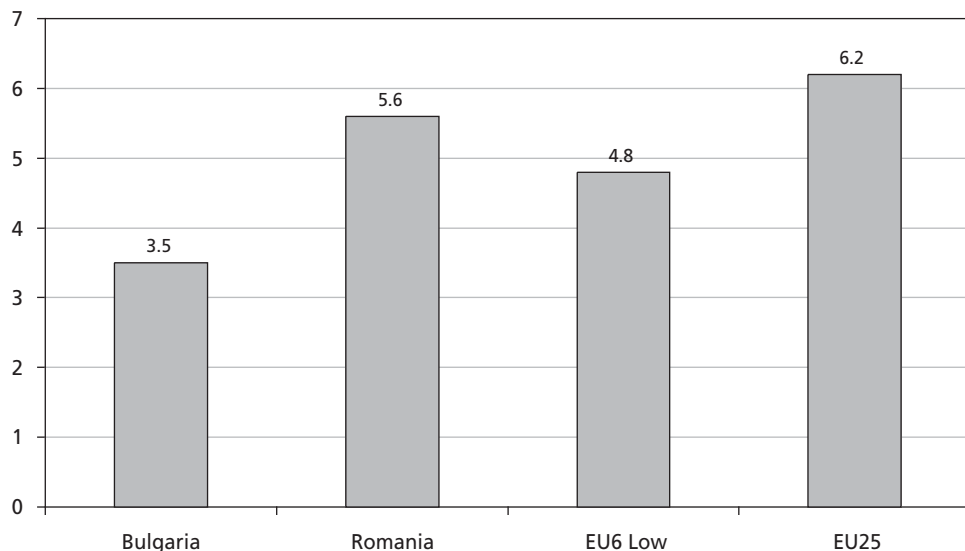


interesting findings emerge in relation to area of residence in Bulgaria: people in rural areas complain less often (39%) about difficulties relating to distance to a doctor's surgery than those living in urban areas (43%). Moreover, people in rural areas also seem to experience fewer difficulties in getting an appointment (37%) and in relation to length of waiting time (30%) than those living in urban areas (44% and 37% respectively). Given the specific context of Bulgaria's health system, which is still undergoing restructuring, it may be easier to understand why people living in urban areas are less satisfied with the healthcare system due to the changes that are still underway in the more complex and sophisticated forms of institutional care in these areas. Conversely, even though the healthcare services provided in rural areas are largely in the form of primary care, the system appears to be more straightforward, cheaper and with better possibilities for forming personable relationships with medical personnel, which might explain why people in these areas appear to be more satisfied with services. In Romania, area of residence is only significant in relation to distance to a doctor's office: accordingly, 22% of respondents in rural areas find it very difficult to access services due to distance, compared with only 8% of those living in urban areas.

### Quality of health services

Respondents in the EQLS were also asked to rate the quality of a number of public services in the country, including health services. Services were rated on a scale of one to 10, where one means very poor quality and 10 means very high quality of services. The respondents' assessments of the quality of health services are a reflection of how well these services function, as well as people's expectations of such services.

**Figure 21 Perceived quality of health services, by country group**



Q.54: In general, how would you rate the quality of health services in (country)? Please tell me on a scale of one to 10, where one means very poor quality and 10 means very high quality.

Source: EQLS, 2003 (average values)

With an average score of 3.5 in relation to the perceived quality of health services, Bulgaria ranks lowest among all of the 27 countries studied (Figure 21). In Romania, the average score is considerably higher at 5.6, which is even above the average of 4.8 recorded in the six low income EU

countries. In the EU25, evaluations of the perceived quality of health services vary from an average of 3.7 in Slovakia to 7.6 in Belgium and 8.1 in Austria. Overall, the average score for the EU25 in this respect was 6.2.

Disparities in the perceived quality of health services between Bulgaria and Romania on the one hand, and the western European countries on the other, mirrors the differences in the objective healthcare capacities of these countries. In 2003, the total expenditure on healthcare, expressed as a percentage of GDP, was 6.1% in Romania and 7.5% in Bulgaria, which places these countries among those with the lowest share of GDP dedicated to health expenditure. Among the six low income Member States, only Estonia (5.3%) and Slovakia (5.9%) recorded a lower share of GDP expenditure on health. In recent years, Bulgaria and Romania have increased their level of health expenditure (WHO, 2002 and 2006); however, in absolute figures, the per capita expenditure on health in 2003 was still very low at only \$159 (approximately €125)<sup>9</sup> in Romania and \$191 (around €151) in Bulgaria (average exchange rate used), which represents the lowest level of health expenditure among the countries studied. In Romania, the per capita expenditure on health was less than half of that in Estonia (\$366 or approximately €289) and only about 5% of the level of health expenditure in countries like Sweden (\$3,149 or around €2,485) or France (\$2,984 or around €2,355) (WHO, 2006).

No significant differences emerge in terms of the perceived quality of health services in relation to gender, employment status or income in the two acceding countries. Age does, however, appear to have some impact in this context: in Bulgaria, young people (aged 18–24 years) evaluate health services significantly higher (4.0) than people aged 65 years and over (3.3). In Romania, differences in the perceived quality of health services emerge in relation to people's level of education and area of residence. For example, people with a primary education evaluate health services more positively (6.1) in comparison with those with a university education (5.3). This clearly underlines the higher expectations and, as a result, the more critical attitude towards health services among those with a higher level of education. At the same time, Romanians living in urban areas assess the quality of health services less favourably (5.3) than those living in rural areas (5.8). Such a pattern is also reflected in other survey data for Romania (Marginean et al, 2003). Even though healthcare services in urban areas are generally more sophisticated and varied, they are also quite disorganised, expensive and impersonal. Rural areas, on the other hand, tend to offer better access to primary healthcare services, which provide more personalised care and which better meet the expectations of people living in these areas. Such differences may partly explain the reasons for the disparities in the perceived quality of health services between people in these two settings.

<sup>9</sup> At an exchange rate of 1 USD = 0.789045 EUR (September 2006).



Quality of life concerns the overall well-being of individuals and encompasses the structural conditions that a society creates for its members as well as the subjective response that people have at individual level to those circumstances. While objective conditions have been the focus of social policy for a long time, subjective quality of life was introduced only relatively recently as a way of looking at what people perceive, want and need. People's own definitions of the circumstances in which they live became important as they provide information on objective situations as well as on values, expectations, aspirations and desires. Although it is not a declared goal of social policy, subjective well-being is of 'high value in itself' (Böhnke, 2005). Referring mainly to the subjective manner in which people experience their lives, subjective well-being includes a cognitive dimension (life satisfaction and satisfaction with various domains) and an emotional or affective component involving pleasant emotions (happiness) and unpleasant emotions (depression, anxiety, or alienation). In essence, subjective well-being acknowledges the authority of the respondents in defining their own lives. The strength of this approach is that it does not impose a normative vision of how things should be by using external frames of reference.

This chapter attempts to provide a picture of subjective well-being in Bulgaria and Romania by focusing on levels of life satisfaction, satisfaction with various life domains and drivers of life satisfaction. Expectations about the future are also included by looking at optimism and its variation according to social group.

## Life satisfaction

Life satisfaction is extensively used in subjective well-being research, as it is considered to be a holistic measure of the quality of life. It represents the final synthesised output of all conditions that people experience in their lives, while also capturing the values, expectations and desires that individuals have in relation to their lives.

The question measuring life satisfaction in the EQLS survey was as follows: 'All things considered, how satisfied are you with your life these days?' The question uses a scale of one to 10, where one means very dissatisfied and 10 means very satisfied. Figure 22 displays the average rating of life satisfaction for all 25 EU Member States and the two acceding countries.

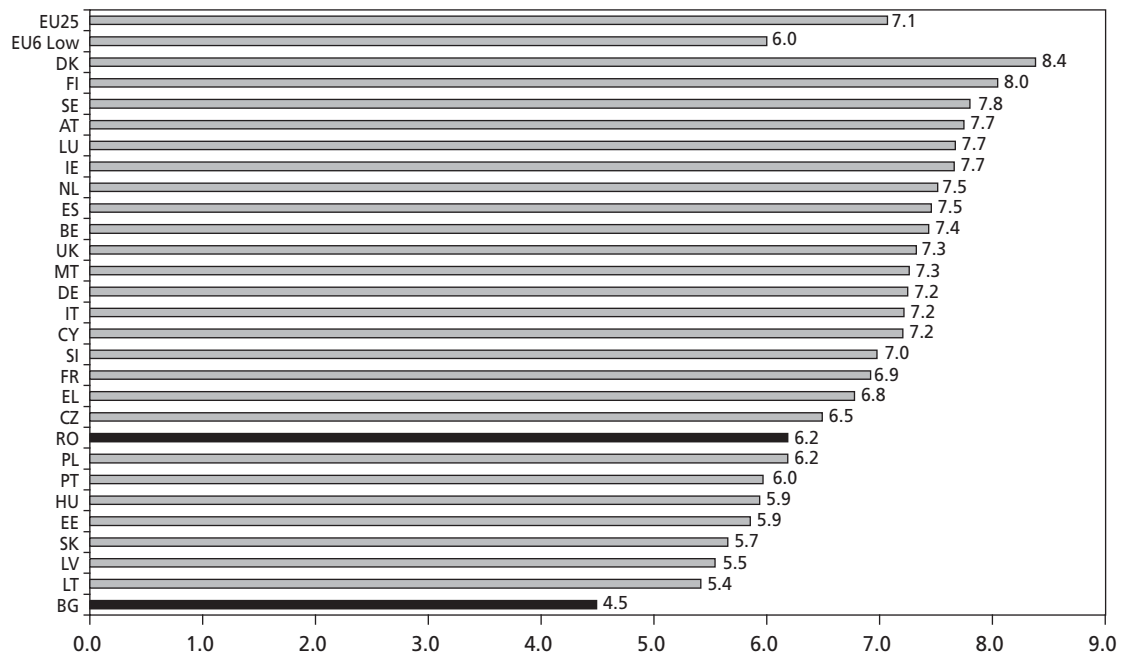
Traditionally, a north–south divide in life satisfaction was observed in western Europe, with Nordic countries being more satisfied and southern countries displaying a lower level of satisfaction, especially Portugal and Greece. This finding was proved by analyses using different datasets (Delhey, 2004; Fahey and Smyth, 2004). The EU enlargement in 2004 created a new east–west gap, which was more pronounced than the north–south divide, as the populations in the new Member States (with the exception of Slovenia) were significantly less satisfied than those in western countries.

With regard to the two acceding countries, Bulgarians are the least satisfied with their life while Romania ranks slightly above the average for the six low income EU countries. However, both countries have a considerably lower level of life satisfaction than is found in most of the EU15. The differences in satisfaction levels can be explained mainly<sup>10</sup> by the fact that societies differ in terms of the conditions and opportunities provided to their members in order to satisfy diverse needs and

<sup>10</sup> Additional explanations (see Donovan and Halpern, 2002; Diener and Biswas-Diener, 2000) pertain to personality, language differences, cultural norms in stating satisfaction or political culture.

enjoy high subjective well-being. Among many structural circumstances – such as economic conditions, political setting, welfare arrangements, employment characteristics, education system, health system and environment – which influence life quality and ultimately life satisfaction, material conditions have a major importance. A significant volume of research evidence proves the relationship between material living conditions and subjective well-being (Delhey, 2004; Alber and Fahey, 2004; Böhnke, 2005; Fahey et al, 2005). Wealthy countries are usually rich in subjective well-being while poor countries are more likely to be deprived in terms of satisfaction.

**Figure 22 Life satisfaction in Europe**



Q.31: All things considered, how satisfied would you say you are with your life these days? Please tell me on a scale of one to 10, where one means very dissatisfied and 10 means very satisfied.

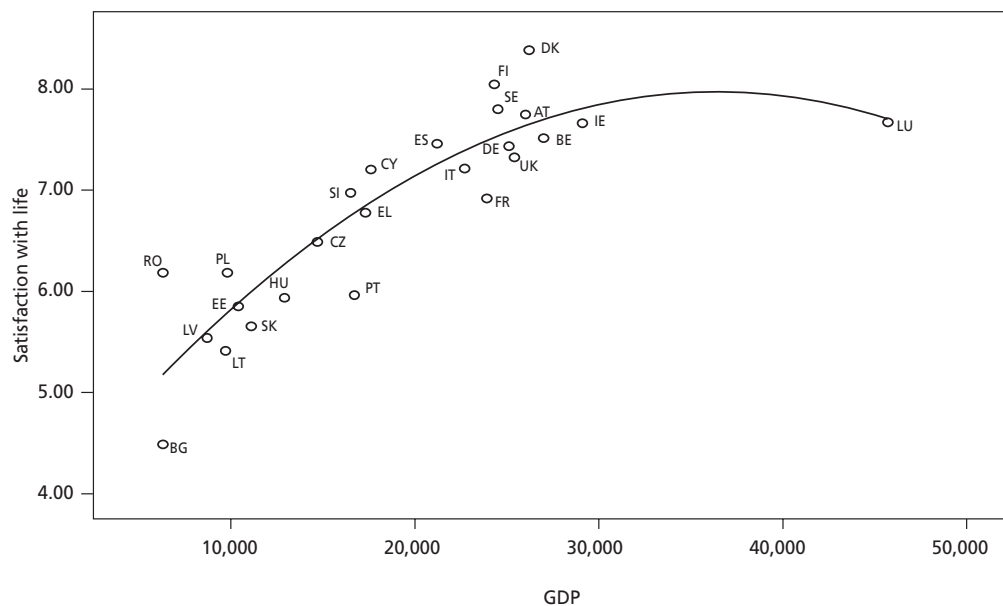
Source: EQLS, 2003 (average values)

The EQLS data, as well as a number of previous research studies, show a strong association between income and life satisfaction; the correlation is stronger in poor countries and less significant in rich states. This pattern points to the importance of income in less wealthy countries like Romania and Bulgaria to satisfy the basic needs of their citizens. Once these needs are fulfilled, personal income does not hold as much influence as before, which can be seen in more affluent countries in Europe.<sup>11</sup> Instead, the effect of national wealth starts to have a significant impact on subjective well-being (Inglehart and Klingemann, 2000). Components of wealth – such as political stability, good welfare provision, efficient healthcare and education systems, quality of environment, equality and human rights – play an important role and combine to contribute to a positive experience of life. These findings indicate that rising national wealth would generally improve subjective well-being in Bulgaria and Romania in a direct way by satisfying the basic needs of citizens in these countries and also through mechanisms of social development.

<sup>11</sup> For these countries, the human development index explains differences in subjective well-being rather than GDP (see Böhnke, 2005).

Both countries have similar per capita income but their citizens report different levels of life satisfaction. The average life satisfaction score in Romania is higher than would be predicted by income (Figure 23), while in Bulgaria it is below the level for countries with a similar GDP. This means that life satisfaction depends not only on income and objective living conditions but also on other factors such as aspirations, expectations and values. In relation to expectations, it is worthwhile referring to the recent history of Bulgaria and Romania. Although both countries had long-term experiences of communism, Bulgaria experienced a less strict communist regime, with a rather smooth departure from its autocratic past; as a result, it had a generally better starting point in relation to its economic transition, compared with Romania. The latter country was ruled by one of the most severe communist regimes in eastern Europe; in contrast with Bulgaria, the overthrow of this autocratic system was traumatic and the starting point to transition was rather low, compared with most former communist countries. Meanwhile, the more favourable conditions in Bulgaria created high expectations, boosted further by the early start of negotiations for EU integration. However, transition proved much more difficult than expected and led to a deterioration of living conditions, including increased job insecurity, unemployment and poverty; consequently, EU accession had to be delayed. In this sense therefore, the low level of subjective well-being in Bulgaria can be linked to the conditions and feelings of disappointment that people had following transition.

**Figure 23 Life satisfaction and GDP per capita (PPS)**



Q.31: All things considered, how satisfied would you say you are with your life these days? Please tell me on a scale of one to 10, where one means very dissatisfied and 10 means very satisfied.

Source: EQLS, 2003, Eurostat 2003 (average values)

When assessing their well-being, people take into consideration their own living conditions as well as those of other people; they compare how well they fare in relation to various groups that are visible to them: neighbours, friends and other reference groups. 'Macro' standards are also employed when assessing certain components of people's lives or life in general. In recent years, the relative model of well-being presented by western Europe became very visible to the citizens of Bulgaria and Romania through the media or various forms of migration. This comparison may act as a moderator of the level of subjective well-being. Previous research (Delhey and Kohler, 2005) proved that

‘upward comparisons’ are particularly important: people who feel deprived relative to other better-off countries are less satisfied with their lives. This could also be a possible explanation for the fact that Bulgaria is placed even lower in satisfaction rankings than would be predicted by GDP.

Various factors can be significant in determining satisfaction at different times. In the case of Romania, the year of the survey (2003) coincided with some improvement, including economic growth, higher quality in the political sphere as a result of a deepening process of democratic consolidation, and progress in welfare redistribution. These factors may have contributed to a higher life satisfaction in Romania than would be expected for a country with that level of income. Furthermore, it is worth mentioning the heavy emphasis on European integration in recent years in this country. This gave a more positive sense of direction to the people and generated greater hope and a sense of optimism. Given these circumstances, it is possible that a general level of positivity may have influenced the evaluations that respondents made of their lives.

### Components of life satisfaction

The following analysis is based on the assumption that life satisfaction is functionally related to the other domains and sub-domains of life: income, housing, job, family, social life and health. Satisfaction with these specific domains provides information on objective conditions in these fields of life and also on the aspirations and values people have in relation to those domains. Essentially, they help in understanding how good or bad circumstances are in terms of these life domains. At the same time, a relative perspective can be employed: comparing the different areas of life allows for a more comprehensive assessment of the more positive or negative realms in quality of life.

**Table 19 Satisfaction with life domains**

|          | Education | Job | Standard of living | Accommodation | Family life | Health | Social life |
|----------|-----------|-----|--------------------|---------------|-------------|--------|-------------|
| Bulgaria | 6.4       | 6.3 | 4                  | 6.4           | 7.1         | 6.5    | 5           |
| Romania  | 7.8       | 7.4 | 6.1                | 7.2           | 8.1         | 7.3    | 6.9         |
| EU6 Low  | 6.3       | 6.8 | 5.5                | 6.6           | 7.7         | 6.8    | 6.2         |
| EU25     | 6.9       | 7.3 | 6.9                | 7.6           | 7.9         | 7.4    | 7.2         |

Q.41: Could you tell me on a scale of one to 10 how satisfied you are with each of the following items, where one means you are very dissatisfied and 10 means you are very satisfied: a) your education; b) your present job, c) your present standard of living; d) your accommodation; e) your family life; f) your health; g) your social life?

Source: EQLS, 2003 (average values)

In Bulgaria, people report the lowest evaluations of life domains among the countries surveyed, while Romania is in many respects close to the EU25 average. In both countries, the standard of living ranks lowest among the various domains, which shows once again that this is the most problematic aspect of people’s lives. Another pattern that emerges for Bulgaria and Romania is the low ranking that people give to their social life, while family life is given the highest value. This model is also found in the six low income EU countries. The low evaluations of social life can easily be explained by the fact that social life is indeed poor and people hardly socialise in comparison with western countries. Social life (or lack of social life) is heavily influenced by poverty, long working hours and the subsequent problems of reaching a balance between work and family life. This essentially shows the difficulties of reaching equilibrium in people’s lives and points to the domains that need to be addressed by social policy, as shown in previous chapters of this report.

It is worth mentioning that the family unit was put under great pressure and to a certain extent overburdened during the process of transformation in these countries, as it took on many responsibilities where society was unable to do so, such as in supporting family members financially in difficult times, and in caring for elderly people and children. Previous research (Mărginean, 2004; Böhnke, 2005; Saraceno and Olagnero, 2004) showed that in post-communist countries, the family acted as a buffer against the difficulties of transition and helped people in coping with the many issues of that period. The survey results indicate that it remains the central value in people's lives.

In relation to people's satisfaction with their education, Romania ranks highest among the countries and country groups included in the analysis. Other datasets on quality of life (Mărginean et al, 2003) also found a very positive evaluation of education in Romania, both at personal and social level, meaning the system of education. This can be explained by the fact that, in this country, education was strongly promoted as a national priority during the communist regime and is still declared as such by law. A positive image at social level was maintained towards education even though the quality of the system deteriorated during the economic transition. In a relative perspective, people also tend to find some positive aspects in this field, given that so many other domains of life are negative.

The relatively high assessment of accommodation, particularly in Romania, calls for some explanation. Although the objective quality of housing is not generally good (as was shown in Chapter 2), people can identify in this domain at least some positive elements, such as property ownership for the vast majority, the freedom to personalise it, and its value as a commodity. Jobs are also positively assessed; the fact that jobs are scarcer in Romania and Bulgaria means that simply being employed is a source of individual satisfaction.

It is worth noting that the higher satisfaction scores of the different domains in Romania are influenced – as in the case of life satisfaction – by certain positive developments in society. The aforementioned historical and cultural differences between the two acceding countries and their impact on people's expectations are also contributory factors in these assessments.

### **Drivers of life satisfaction**

The positions that individuals hold in society influence their quality of life to a great extent. While it is obvious that characteristics like income, age, residence and employment status determine variations in living and working conditions, they also shape the way people define their lives. This section analyses the perception of life according to the positions (Delhey, 2004) that individuals occupy in the social structure, either of a 'vertical' (income, education, employment status, health) or 'horizontal' (age, sex, household type) nature. A relative perspective was employed, which means that data for specific population groups are compared, relative to the average value of life satisfaction index in each of the countries and country groups studied (deviation from the mean method).



**Table 20 Average life satisfaction and deviation from the average, by social group**

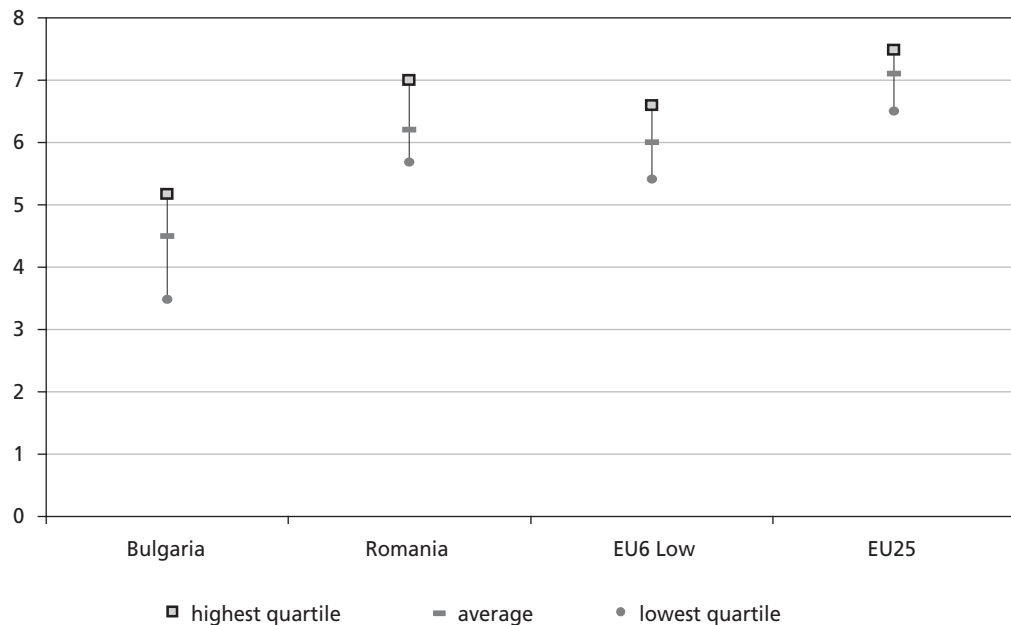
|          | Average total | Income          |                  | Education |      | Employment status |            | Longstanding illness |      |
|----------|---------------|-----------------|------------------|-----------|------|-------------------|------------|----------------------|------|
|          |               | Lowest quartile | Highest quartile | Low       | High | Employed          | Unemployed | Yes                  | No   |
| Bulgaria | 4.5           | -1.0            | +0.7             | -0.7      | +0.8 | +0.3              | -0.3       | -0.7                 | +0.3 |
| Romania  | 6.2           | -0.5            | +0.8             | -0.4      | +0.5 | +0.3              | -0.4       | -1                   | +0.3 |
| EU6 Low  | 6             | -0.6            | +0.5             | -0.7      | +0.7 | +0.2              | -1         | -0.6                 | +0.3 |
| EU25     | 7.1           | -0.6            | +0.4             | -0.3      | +0.4 | +0.2              | -1.4       | -0.5                 | +0.2 |

Q.31: All things considered, how satisfied would you say you are with your life these days? Please tell me on a scale of one to 10, where one means very dissatisfied and 10 means very satisfied.

Source: EQLS, 2003

Income influences life satisfaction to a large extent in all countries and country groups included in the analysis. The effect is even greater in Bulgaria and Romania, the poorest among all of the countries studied, suggesting again that this aspect is particularly important where basic necessities are not covered. In more affluent country groups, income becomes less significant for life satisfaction, suggesting that it might act like a ‘hygiene factor’ (Zamfir, 1984) – crucial to the extent that it helps to satisfy primary needs, but then becoming less essential. In this respect, it is also interesting to present EQLS data which show that people in the highest income quartile in Bulgaria have a level of life satisfaction that is considerably below the satisfaction level of the lowest income quartile in the EU25 (Figure 24).

**Figure 24 Average life satisfaction, by income quartile**



Q.31: All things considered, how satisfied would you say you are with your life these days? Please tell me on a scale of one to 10, where one means very dissatisfied and 10 means very satisfied.

Note: Income quartiles are calculated on the basis of the household equivalent income (new OECD) scale.

Source: EQLS, 2003

Education is a factor contributing to life satisfaction. Educated people are more content, while those with a low education level declare themselves rather unsatisfied. Obviously, education empowers people to lead more satisfying lives as it provides them with the means for dealing with the various problems they might encounter, especially in social conditions that are present in poorer countries. It also impacts on other spheres of life, such as ensuring better quality jobs, income and cultural consumption. Education seems more important in the case of Bulgaria and the six lower income EU countries, which partly suggests that this was one of the main mechanisms available to individuals to cope with the difficulties of the transformation period.

Health is also of importance for life satisfaction. While being healthy generally means a higher life satisfaction, illness impacts significantly in a negative way on how people evaluate their lives. Those who suffer from a longstanding illness declare themselves much less satisfied with their lives than the average. This effect is stronger in Bulgaria and Romania, which can be explained by the fact that their healthcare services deteriorated to a great extent during the past years and left people more on their own, without providing them with adequate means for dealing with their health problems.

Having a job has a positive effect on life satisfaction, while unemployment reduces the satisfaction level. This pattern is more evident in EU Member States, revealing the very negative impact that the experience of being unemployed can have at individual level. This influence is not as marked for Romania and Bulgaria where the unemployment experience is relatively recent and somehow more socially acceptable in the sense that people probably take some comfort in the fact that this is common in society and forms a part of the transition process.

**Table 21 Average life satisfaction and deviation from the average, by social group**

|          | Average total | Sex   |      | Household type |        |                      | Age          |           | Area of residence |       |
|----------|---------------|-------|------|----------------|--------|----------------------|--------------|-----------|-------------------|-------|
|          |               | Women | Men  | Living alone   | Couple | Couple with children | 18– 34 years | 65+ years | Rural             | Urban |
| Bulgaria | 4.5           | +0.2  | -0.2 | -0.3           | +0.1   | +0.4                 | +0.6         | -0.3      | -0.2              | +0.5  |
| Romania  | 6.2           | -0.1  | 0    | -0.4           | +0.2   | +0.3                 | +0.6         | -0.6      | 0                 | -0.1  |
| EU6 Low  | 6             | 0     | 0    | -0.6           | +0.1   | +0.4                 | +0.5         |           | -0.3              | +0.1  |
| EU 25    | 7.1           | 0     | 0    | -0.3           | +0.3   | +0.2                 | +0.1         | 0.1       | 0                 | 0     |

Q.31: All things considered, how satisfied would you say you are with your life these days? Please tell me on a scale of one to 10, where one means very dissatisfied and 10 means very satisfied.

Source: EQLS, 2003

In relation to 'horizontal' structures, age and household type determine some variations in life satisfaction. Generally, young people are somewhat more satisfied with their lives, while older people define life in a more negative way. However, there are differences between the countries. Age is almost of no significance in the EU25, where opportunities do not depend much on this factor. However, in Bulgaria, Romania and the NMS, the economic transition impacted differently on various generations: whereas for younger people it meant challenges and opportunities, for older people it represented disruption of life and more problems. Elderly people were among those referred to as the 'losers' of the transition – people whose life opportunities narrowed considerably during the transformation process.

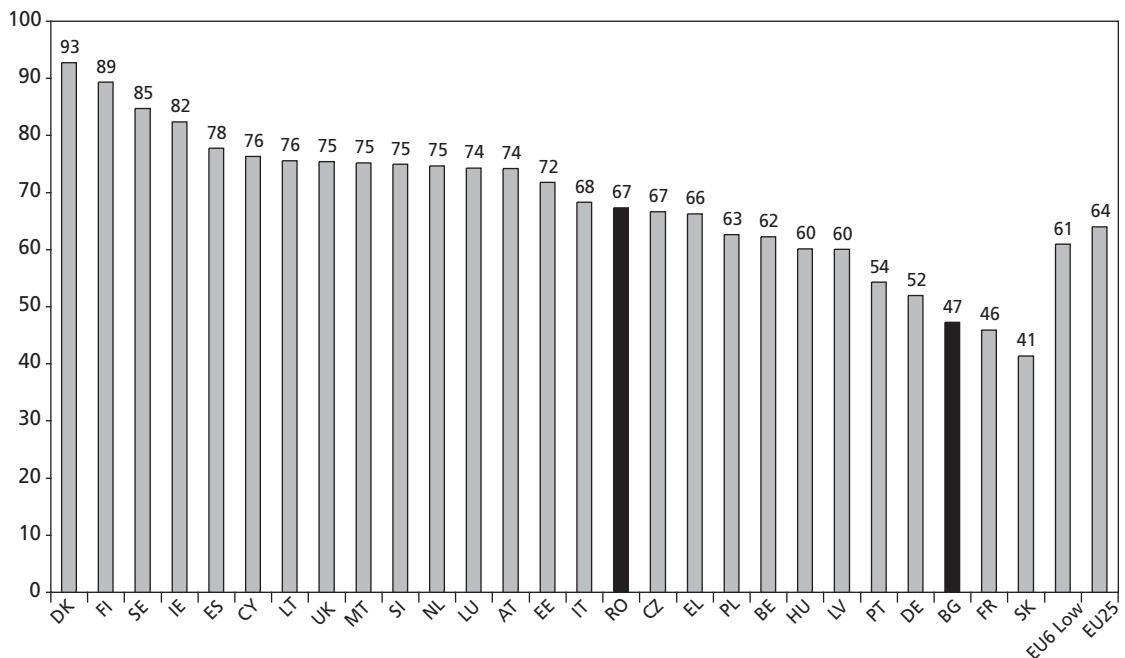
Household type has some impact on life satisfaction. Single people are less satisfied with their life than those living in families. This has probably to do with the social and economic conditions of single people (living alone often means being more exposed to economic difficulties), but even more with other benefits that family life brings to individuals, such as safety, social relations and love. Having children in the household also contributes to a certain extent to a higher life satisfaction.

Gender is not a significant factor in this context. Residing in urban areas has a positive influence on life satisfaction in Bulgaria; living in an urban environment probably provides Bulgarians with more opportunities that translate into a higher life satisfaction.

### Expectations about the future

While people's evaluation of their life satisfaction gives a picture of the current situation, the degree of optimism they express can indicate their future expectations and hopes. The two views are not mutually exclusive. On the one hand, optimism is to a certain extent the result of positive experiences in various realms of life. In this case, individuals have an affirmative and confident attitude towards their future which they see as encouraging. On the other hand, positive approaches to life contribute to developing constructive life strategies in which people act with confidence and actively try to build a kind of life in accordance with their values and goals. In a similar way to life satisfaction, optimism shows a distribution of positive feelings in society but also indicates a certain direction that is envisioned for the respective society.

**Figure 25 Optimism about the future (%)**



Q.30: Please tell me whether you agree completely, agree somewhat, disagree somewhat or disagree completely with the statement: I am optimistic about the future.

Note: The percentages represent the proportion of people agreeing completely or somewhat that they are optimistic about the future.

Source: EQLS, 2003

The EQLS results show that Bulgaria reports low levels of optimism; less than half of its population (47%) have a positive outlook on the future. The average proportion of optimism in the EU25 is 64%, with the Scandinavian countries and Ireland having particularly high levels, at between 82% and 93% (Figure 25). Romania (67%) has a higher optimism score than the EU25 average, and much higher than Bulgaria. This might be, as in the case of life satisfaction,<sup>12</sup> a result of a general good mood and a certain positive development in the society around the time of the survey.

When looking at optimism about the future according to the various social groups, the patterns identified by the EQLS data are rather similar for the countries and country groups included in the analysis. Having a high income, good education, being employed and healthy generally contribute to being optimistic. This is also the case in Romania and Bulgaria. The proportion of optimists among higher income groups, employed, healthy or well-educated people is higher than that among the groups that are disadvantaged in these respects. It is worth noting that the proportion of optimists in the advantaged groups in Bulgaria is often below the share of optimists in disadvantaged groups (having low income or education, being unemployed or ill) in the six low income EU countries and the EU25 (Table 22).

**Table 22 Optimism about the future: proportion of optimists, by social group (%)**

|          | Total | Income          |                  | Education |      | Employment status |            | Longstanding illness |    |
|----------|-------|-----------------|------------------|-----------|------|-------------------|------------|----------------------|----|
|          |       | Lowest quartile | Highest quartile | Low       | High | Employed          | Unemployed | Yes                  | No |
| Bulgaria | 47    | 36              | 50               | 31        | 52   | 50                | 46         | 35                   | 52 |
| Romania  | 67    | 60              | 80               | 57        | 76   | 72                | 58         | 51                   | 73 |
| EU6 Low  | 61    | 54              | 71               | 52        | 75   | 66                | 54         | 51                   | 66 |
| EU25     | 64    | 56              | 72               | 59        | 73   | 69                | 50         | 53                   | 67 |

Q.30: Please tell me whether you agree completely, agree somewhat, disagree somewhat or disagree completely with the statement: I am optimistic about the future.

Note: The percentages represent the proportion of people agreeing completely or somewhat that they are optimistic about the future.

Source: EQLS, 2003

In Bulgaria, gender or area of residence does not have a significant impact in relation to optimism. An above average proportion of optimism is found among younger people (aged 18–34 years) and among couples with children, which is the same pattern found in the six low income EU countries and the EU25. Nevertheless, the proportion of optimism among young people (aged 18–34 years) in Bulgaria is still very low and is not much higher than that among elderly people (aged 65 years or more) in the EU25.

In Romania, the proportion of optimists is much higher than in Bulgaria and the differences between opposite categories are wider. This can be seen in particular when age is considered: 80% of young people (aged 18–34 years) are optimistic about the future, while only 56% of elderly people share this feeling. A low level of optimism among older people might reflect – just as with life satisfaction – a very low quality of life within this group.

<sup>12</sup> Life satisfaction and optimism are correlated in both Bulgaria and Romania, but the correlation is weaker for Romania (correlation coefficient is 0.45 for Bulgaria and 0.35 for Romania,  $p=0.05$ ).

**Table 23 Optimism about future, by social group (%)**

|          | Total | Sex   |     | Household type |        |                   | Age         |           | Area of residence |       |
|----------|-------|-------|-----|----------------|--------|-------------------|-------------|-----------|-------------------|-------|
|          |       | Women | Men | Living alone   | Couple | Couple + children | 18-34 years | 65+ years | Rural             | Urban |
| Bulgaria | 47    | 46    | 48  | 44             | 42     | 50                | 59          | 33        | 48                | 47    |
| Romania  | 67    | 67    | 67  | 56             | 63     | 70                | 80          | 46        | 65                | 70    |
| EU6 Low  | 61    | 61    | 62  | 55             | 58     | 64                | 73          | 52        | 57                | 65    |
| EU25     | 64    | 63    | 65  | 59             | 63     | 68                | 75          | 55        | 61                | 67    |

Q.30: Please tell me whether you agree completely, agree somewhat, disagree somewhat or disagree completely with the statement: I am optimistic about the future.

Note: The percentages represent the proportion of people agreeing completely or somewhat that they are optimistic about the future.

Source: EQLS, 2003

Perceived quality of society represents an important dimension in the quality of life concept and encompasses people's evaluations of social institutions, perceptions of solidarity in society as well as the trust people have in each other (Nauenburg, 2004). People's assessment of the quality of the society in which they live complements the picture of their quality of life based on objective living conditions and subjective well-being, contributing to a comprehensive overview of the quality of life (Zapf, 1984).

The EQLS includes a series of questions aimed at shedding light on the quality of society as perceived by the citizens of the various countries. The questions focus on three different levels of society in an attempt to provide an integrated picture of the social conditions in these countries. Firstly, at micro level, the survey asks respondents about the amount of trust that people have in each other (indicator of the social capital people have in society); secondly, at mezzo level, respondents are asked about safety in the neighbourhood (indicator of the quality of the communities in which people live); and thirdly, at macro level, the survey asks people about social tensions that are present in their countries and about their perceptions of the quality of public services (indicating the quality of the overall society).

## Trust in people

Trust in people is regarded as a basic ingredient of social relationships. People interrelate with each other by relying on a certain amount of trust that helps them engage in positive and rewarding relations. Conversely, suspicion and distrust act as barriers to social participation and integration.

The EQLS measures trust by means of a question asking respondents to rate the trust they have in others on a scale of one to 10, where one means 'you cannot be too careful' and 10 means 'most people can be trusted'. The results reveal large differences across Europe in this respect. The level of trust in people varies from 4.1 in Cyprus to 6.9 in Denmark and 7.1 in Finland. Bulgarians display a very low level of trust in people (4.4) while Romanians score higher on this indicator (5.4) and show the same level of trust as people in the EU25 on average. The results for the two acceding countries are in line with the general low level of evaluations that Bulgarians indicate for most of the other dimensions of their life and with the moderate level shown by Romanians (see also Chapters 6 and 7).

When looking at trust across social groups, some important differences emerge. People with a higher education and high income tend to have greater trust in others than those in the opposite categories. This pattern is found for the six low income EU countries and the EU25, being most pronounced in Bulgaria. Here, a significant difference is found in level of trust between those with a primary education and higher education (4.2 in comparison with 4.8), and between people in the bottom quartile of the income distribution and those in the top income quartile (4.0 compared with 4.9).

Trust induces trust: those who trust others get involved in common actions – mostly within the framework provided by civil society – which, when successful, contribute in turn to an increased level of trust. This means that a society that is rich in structural opportunities and provides its members with a broad spectrum of associations offers people the chance to participate within various social networks and thus contribute to a growth of social trust (Putnam, 1993, 2000). Bulgaria and Romania have no tradition of civil society and both have tried to build this sector from scratch during

transition. Moreover, social relationships may still be shaped by the communist heritage characterised by high distrust in people outside primary groups and in social institutions, as well as through social self-isolation. This reveals the need to generally encourage social participation in Bulgaria and Romania and provide people with incentives for involvement in common issues while, at the same time, supporting the formation of organisations and associations that can supply people with adequate means for collective action and participation. This is very much emphasised at EU level where strategies for promoting social inclusion encompass measures that support social participation. Such participation is seen as a means of building the confidence and self-esteem of individuals through new contacts and networks (European Commission, 2002).

## Alienation

While trust helps in understanding the social relations that people establish with each other, by measuring alienation it is possible to gauge the relationships that individuals develop with their societies and of the feelings resulting from this interaction.

The EQLS data reveal that a relatively high proportion of people in the six low income Member States and in the acceding countries feel alienated. However, Bulgaria records the highest figures for all four indicators considered. A sense of social exclusion is quite widespread since 14% of people in the country feel that they are left out of society. In Romania and the six low income EU countries, 6% of respondents share the same feeling while, in the EU25, just 3% of respondents feel that they are left out of the society in which they live.

**Table 24 Sense of alienation (%)**

| Country  | In order to get ahead nowadays you are forced to do things that are not correct | I feel left out of society | Good luck is more important for success than hard work | Life has become so complicated today that I almost can't find my way |
|----------|---|----------------------------|--|--|
| Bulgaria | 28  | 14                         | 23   | 33   |
| Romania  | 24  | 6                          | 21   | 18   |
| EU6 Low  | 23  | 6                          | 23   | 17   |
| EU25     | 10  | 3                          | 12   | 9  |

Q.30: Please tell me for each statement whether you agree completely, agree somewhat, disagree somewhat, or disagree completely with each statement: In order to get ahead nowadays you are forced to do things that are not correct; I feel left out of society; Good luck is more important than hard work for success; Life has become so complicated today that I almost can't find my way.

Note: The table represents the answers of respondents who agree completely with the statements.

Source: EQLS, 2003

A sense of disorientation also seems to characterise life in Bulgaria, where one third of respondents completely agree that life has become so complicated that they can hardly find their way. The corresponding figure is 18% in Romania, 17% in the six low income EU countries and only 9% in the EU25. Complexity in society increased in the transition countries as life became less predictable for people who were not used to the risks of a free market economy. The many social problems that accompanied transformation added to this complexity, making people feel that they live in complicated societies that do not provide them with concrete ways and means to reach their personal goals.

Transition seems to have affected certain basic values in the society. In Bulgaria, 28% of the population strongly believe that success can only be achieved by doing things that are wrong. In Romania, 24% of respondents share the same opinion, in comparison with 10% in the EU25. This suggests a perception of a state without normal social standards in the post-communist countries, which is reflected in weakened social control, increased crime and corruption, and erosion of moral values. These processes have been translated at individual level into a feeling that society encourages behaviours and strategies that are not correct.

Moreover, transition seems to have affected a basic relationship – that between work and pay, or effort and reward. Economic crises in the early years of transition caused huge unemployment, a sharp reduction in income and rapid social polarisation, all of which represented a new situation for these traditionally egalitarian societies. In these circumstances, work as a value partially lost its significance for personal success and people often feel that factors that are not under their own control – such as good luck – are more important for personal success. This is equally the case in Bulgaria, Romania and the six low income EU countries. In these countries, the proportion of people who believe that good luck is more important than hard work is double that in the EU25. Essentially, it indicates a sense of powerlessness, where people feel they cannot influence the course of actions and build meaningful life strategies.

## Safety of neighbourhood

The safety of the community in which people live is an important dimension of quality of society. In this respect, the EQLS asked respondents whether it was safe to walk at night around their neighbourhood; four answering categories were offered: ‘very safe’, ‘safe’, ‘rather unsafe’ and ‘very unsafe’.

**Table 25 Perceptions of safety of neighbourhood (%)**

|          | Safe neighbourhood | Unsafe neighbourhood |
|----------|--------------------|----------------------|
| Bulgaria | 61                 | 39                   |
| Romania  | 65                 | 35                   |
| EU6 Low  | 66                 | 34                   |
| EU25     | 77                 | 23                   |

Q.57: How safe do you think it is to walk around your area at night? Do you think it is: 1. very safe; 2. rather safe; 3. rather unsafe; 4. very unsafe?

Note: Proportion of the various categories of people reporting ‘very unsafe’ or ‘rather unsafe’.

Source: EQLS, 2003

The vast majority of people in Europe feel safe in the communities they live in. However, in some countries in Europe, a relatively large proportion of people feel unsafe. This is particularly the case in Bulgaria and Romania. The higher figures for these two countries might be explained by the general increase of criminality in recent years. Furthermore, the fact that criminality in its diverse forms is now extensively revealed to people through the media, which was not the case in the pre-transition period, might contribute to increased feelings of insecurity.



**Table 26 Unsafe neighbourhood, by socio-demographic variables (%)**

| Countries | Age         |           | Sex |       | Area of residence |       |
|-----------|-------------|-----------|-----|-------|-------------------|-------|
|           | 18–24 years | 65+ years | Men | Women | Rural             | Urban |
| Bulgaria  | 24          | 48        | 31  | 46    | 28                | 49    |
| Romania   | 27          | 46        | 26  | 44    | 28                | 44    |
| EU6 Low   | 26          | 44        | 29  | 38    | 17                | 49    |
| EU25      | 19          | 32        | 17  | 28    | 13                | 30    |

Q.57: How safe do you think it is to walk around your area at night? Do you think it is: 1. very safe; 2. rather safe; 3. rather unsafe; 4. very unsafe?

Note: Proportion of the various categories of people reporting 'very unsafe' or 'rather unsafe'.

Source: EQLS, 2003

People aged over 65 years have a high sense of insecurity, probably due to their generally greater frailty. Women are much more likely than men to frequently feel unsafe in the neighbourhood. People living in urban areas feel more insecure as criminality is generally much more widespread in cities than in rural districts. Moreover, in urban areas, especially in Bulgaria, Romania and the six low income EU countries, people live in neighbourhoods characterised by large blocks of flats, the majority being built in communist times, in which people live very much apart in social respects, despite being in close proximity. This might contribute to an increased feeling of insecurity in urban areas.

## Quality of public services

In order to evaluate the quality of social services, the EQLS asked respondents to assess the quality of education, healthcare,<sup>13</sup> state pensions, social services and public transport. All of these services were rated by respondents on a scale of one to 10, where one means very poor quality and 10 means very high quality.

**Table 27 Quality of public services**

| Country  | Education | Healthcare | State pensions | Social services | Public transport |
|----------|-----------|------------|----------------|-----------------|------------------|
| Bulgaria | 4.4       | 3.5        | 3.3            | 3.6             | 4.9              |
| Romania  | 6.5       | 5.6        | 5.3            | 5.6             | 6.2              |
| EU6 Low  | 5.8       | 4.8        | 4.4            | 4.2             | 5.7              |
| EU25     | 6.3       | 6.2        | 5.3            | 6.0             | 6.1              |

Q.54: In general, how would you rate the quality of each of the following public services in your country? Please tell me on a scale of one to 10, where one means very poor quality and 10 means very high quality.

Source: EQLS, 2003 (average values)

Bulgarians give a very low evaluation of all public services, which undoubtedly reflects a generally low quality of these services. These assessments are also in line with the low level of subjective well-being in Bulgaria, which is the result of difficult material circumstances but also of certain conditions and expectations (as shown in Chapter 7). Social services, healthcare and state pensions in Bulgaria are perceived, in particular, to be of low quality. The evaluations of public transport and education

<sup>13</sup> The health system was analysed in detail in chapter 6

are more positive, but are still very poor in comparison with the two reference country groups. Romanians assess the quality of public services considerably (about 50%) higher than Bulgarians do, rating education services highest, followed by public transport, healthcare, social services and state pensions.

The relatively higher evaluation of public transport in both countries can be explained by the fact that this service has been improved and modernised during the recent years. The education systems in Bulgaria and Romania are rated highly relative to most other services in the two countries. In Romania, a high assessment of education services is a feature that is consistently shown by survey data in this country (Mărginean, 2004). As was noted in Chapters 3 and 7, education was particularly encouraged during the communist regime and retained its significance during the transition period, despite some deterioration in quality in recent years.<sup>14</sup> Bulgaria probably had a similar experience.

State pension systems rank lowest in terms of quality among the public domains in Bulgaria and Romania. These systems experienced substantial financial difficulties during the early stages of transition, which resulted in a sharp decline in pension levels. The situation with pension funds has been improving in more recent years but only very slowly. Due to budgetary constraints, Romania set aside just 7% of GDP to pensions in 2003 while Bulgaria allocated 9.1% of GDP (INS, NSSI, 2005). In other EU countries, the relative expenditure on pensions is higher, for example at 9.3% in Hungary, 14.3% in Poland, 13.4% in Germany and 15.1% in Italy (Eurostat, 2006).

## Social tensions

In the EQLS, respondents were asked about the extent to which they were aware of tensions in society. The question covered five domains: tensions between rich and poor people, management and workers, men and women, old and young people, and between different racial or ethnic groups. A total of three answering categories were offered to the respondents: 'a lot of tension', 'some tension' and 'no tension'. Based on the answering category 'a lot of tension', an index of social tension has been constructed with the value varying between zero (none of the five domains recorded 'a lot of tension') and five (for all five domains, the respondent perceived 'a lot of tension'). The individual indices are averaged at national level.

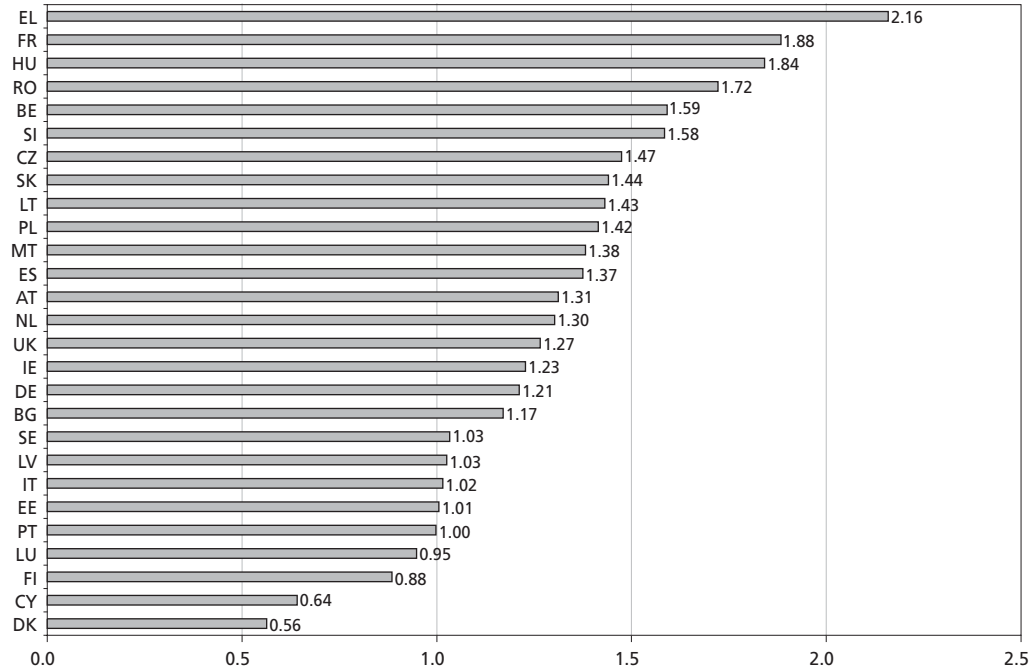
Examining the individual countries by the average number of perceived social tensions (Figure 26), Greece ranks highest in Europe, followed by France and Hungary. Romania also ranks highly, with an average of 1.59 tensions perceived. Bulgarians are less concerned about the possible tensions in society.

Various types of tensions are perceived differently across the countries and the country groups. Bulgarians and Romanians are much more concerned about 'vertical tensions', i.e. tensions between social classes (between rich and poor people, management and workers) than about 'horizontal' ones (between sexes, generations, ethnic groups). A particularly large proportion of citizens in the two

<sup>14</sup> The capacity and quality of public services can be indicated by the spending that each country mobilises in order to support the various services. Looking at public expenditure for education as a percentage of GDP, a low level of investment is found in both countries: Bulgaria allocated 3.6% of GDP to education for the academic year 2002/2003, while Romania allocated 3.5% of GDP during that period. This level of spending is the lowest among European countries. Among the EU15, Sweden spent 7.7% of GDP on the education system in the same period and Denmark invested 8.5% of GDP; among the NMS, Slovenia allocated 6.2% of GDP and Estonia put aside 5.7% of GDP (UNESCO, 2006).

acceding countries (54% in Bulgaria and 53% in Romania) perceive a lot of tension between poor and rich people. This mirrors the increasing income inequality and economic polarisation that characterise transition processes in these countries.

**Figure 26 Index of tensions between social groups**



Q.29: In all countries, tensions sometimes exist between social groups. In your opinion, how much tension is there between each of the following groups in your country: poor and rich people, management and workers, men and women, old people and young people, different racial and ethnic groups: a lot of tension, some tension, no tension?

Note: The index represents an average of the number of tensions in each country for which people reported 'a lot of tension'. The index varies from zero to five. The higher the index, the more tensions exist in society.

Source: EQLS, 2003 (authors' calculations)

Economically disadvantaged groups in Bulgaria represent an above average proportion of people perceiving a lot of tensions between poor and rich people: 60% of those in the low income group perceive such tension, as do 56% of unemployed people, 57% of retired people and 56% of low skilled persons. In Romania, the data reveal a reverse pattern to Bulgaria: the economically disadvantaged groups perceive tension between rich and poor people less often than the categories who are relatively advantaged. The exception is the group of unemployed people, a very large proportion of whom (77%) perceive a lot of poor–rich tensions. The respective figures for employed people (53%) and retired people (47%) are lower.

**Table 28 Tensions between social groups, %**

|          | Poor and rich people | Management and workers | Men and women | Old and young people | Different racial and ethnic groups |
|----------|----------------------|------------------------|---------------|----------------------|------------------------------------|
| Bulgaria | 54                   | 37                     | 9             | 17                   | 13                                 |
| Romania  | 53                   | 49                     | 18            | 29                   | 33                                 |
| EU6 Low  | 54                   | 49                     | 9             | 17                   | 30                                 |
| EU25     | 35                   | 36                     | 12            | 16                   | 45                                 |

Q.29: In all countries, tensions sometimes exist between social groups. In your opinion, how much tension is there between each of the following groups in your country: poor and rich people, management and workers, men and women, old people and young people, different racial and ethnic groups: a lot of tension, some tension, no tension?

Note: Proportion of people reporting 'a lot of tension'.

Source: EQLS, 2003

Another vertical tension that reflects a traditional divide (Nauenburg, 2004) is that between management and workers. Fewer survey respondents in Bulgaria than in Romania perceive this type of tension; the proportion of those citing this type of tension in Romania (49%) is the same as that in the six low income EU countries (Table 28). In Bulgaria, tensions between management and workers are perceived to a greater extent by people who are lower educated (44%) in comparison with those who are highly educated (30%). Poor people (39%) are more likely to perceive such tensions, compared with those who are better off (32%), while unemployed people (40%) and retired people (44%) are more likely to perceive this tension in comparison with those who are employed (33%).

In relation to perceived tensions between management and workers, Romania repeats the pattern found with respect to tensions between poor and rich people. The groups that are relatively advantaged display a higher perception of tensions between workers and management: those who are highly educated (48%) in comparison with low educated people (43%); young people (56%) compared with old people (40%); employed people (50%) in comparison with retired people (42%); those in urban areas (53%) compared with people in rural areas (46%). The exception again is unemployed people, 64% of whom consider that tensions between management and workers are present in this country.

Tensions between men and women are perceived to a greater extent in Romania (18%) than in Bulgaria (9%). Across Europe, perceptions of this type of tension vary from 4% in Latvia and 6% in Denmark to 27% in Greece and 34% in Turkey. In addition, tensions between old and young people are more often perceived by Romanians (29%) than by Bulgarians (17%). In Europe, the proportion of people perceiving this type of tension as being present in society varies from 3% in Denmark to 27% in Greece.

With regard to tensions between different racial and ethnic groups, Bulgarians are not very concerned about this issue. With only 13% of respondents perceiving a lot of tension between ethnic groups, Bulgaria reports one of the lowest proportions among the country groups; only Lithuania has a smaller share, at 10%. In Romania, the proportion is much higher (33%) and may reflect the higher level of ethnic diversity in the country, such as the large Roma and Hungarian ethnic groups. Other factors – historical, political, cultural and economic – can also play a significant role in shaping people's perceptions about ethnic tensions in the country.



This report is the first comprehensive analysis on quality of life in Bulgaria and Romania that considers the issue in a European context. The report highlights not only objective living conditions of people in the two acceding countries – Bulgaria and Romania – but also subjective well-being and individuals' perceptions of the quality of the society in which they live. It draws on the results of the first European Quality of Life Survey (EQLS), which was carried out in 2003 in the EU25, Bulgaria, Romania and Turkey. The report comes at a crucial time for Bulgaria and Romania, as their accession to the EU is scheduled for 2007. Although quality of life is not a criterion for accession, research in this comprehensive sphere contributes to understanding the disparities in the various realms of peoples' lives and to identifying appropriate measures that are needed in order to achieve social cohesion at European level.

Each chapter of the report has examined different quality of life issues: economic situation; housing and local environment; employment, education and skills; household structure and family relations; work–life balance; health and healthcare; subjective well-being; and perceived quality of society. The main objectives of the report are to describe the material conditions and subjective well-being that characterise Bulgaria and Romania, and to identify the relationship between objective living conditions and subjective components of quality of life. Furthermore, the report compares the two countries in a number of quality of life dimensions, aiming to identify areas in which these countries can be regarded as similar or as different in terms of their economic, social and cultural integration in the EU25. Finally, the report places the quality of life in Bulgaria and Romania in a broader international context and compares results for these two countries with those for six low income new Member States – Hungary, Poland, Slovakia, Latvia, Lithuania and Estonia – and the average for the EU25. Such comparisons make it possible to assess whether the two countries pose the same challenges for EU integration as did other former communist countries that joined the EU in 2004, or whether the accession of Bulgaria and Romania will create specific and new integration challenges for the EU.

The accession of Bulgaria and Romania will open new opportunities for Europe, but also significant challenges. The EU of 27 Member States will become even more heterogeneous in terms of cultures, political traditions, level of economic development and living conditions. The research has revealed large discrepancies in quality of life between the two candidate countries and the EU25, especially with regard to material living conditions, quality of employment and working conditions, health and subjective well-being. However, in other domains of quality of life, smaller differences emerge between the two country groups, such as in relation to social support networks and certain indicators on housing. Furthermore, the research indicates that Bulgaria and Romania, although similar in the level of living standards cannot be seen as a unit. In many quality of life aspects, one or the other comes closer to either the six low income EU countries or the EU25. Thus, each country will offer different opportunities and challenges in terms of integration in the EU.

The analyses in this report are based mainly on the EQLS but data were supplemented, when needed, with statistical information and also with data provided by the Eurobarometer, the European Values Survey and the European Labour Force Survey. The EQLS represents an important opportunity to understand the situation in relation to quality of life in Bulgaria and Romania before integration and also after the process of enlargement has taken place, as a new wave of EQLS is intended for 2007. Data used in this report refer to 2003 and are analysed in a relative perspective, comparing Bulgaria and Romania with the other country groups.

The following sections highlight the main results presented in each chapter of the report.

### **Economic situation**

The per capita GDP, as one of the key macroeconomic indicators, shows that Bulgaria and Romania have the lowest level of economic output among all 27 countries studied. Consequently, citizens of Bulgaria and Romania also have the lowest standard of living. The analysis found that the gap in standard of living between the two acceding countries and the EU average is even wider than that for macro indicators (per capita GDP). High economic growth, which has been characteristic of the two acceding countries in recent years, has not translated into a consequent increase of income at household level.

The average level of net (equivalised) household income in Bulgaria and Romania in 2003 was under €300 (PPP) per month. This represents only about a half of the income level in the six low income EU countries and less than a third of the EU25 average. In addition to a generally low level of household income, the two acceding countries are characterised by substantial income inequality, particularly in Romania. Here, the average income in the highest income quartile is 5.6 times higher than that in the lowest income quartile; while in Bulgaria, the average income in the highest income quartile is four times higher than that in the lowest income quartile. The average monthly household income in the poorest quartile in both candidate countries was around €100, which is very low in EU terms.

Unemployed people and their families, as well as low skilled people, are the groups most at risk of income poverty. This indicates that social inclusion and anti-poverty policies should rely much more on labour activation measures, in particular on facilitation of job creation and increasing employability through education and training. Apart from the aforementioned groups, pensioners (single people and couples over 65 years of age) are also under increased risk of income poverty, particularly in Bulgaria. This group needs to be targeted by another set of policy measures – passive measures such as social transfers and income support – that should ease their financial problems and help their social inclusion.

In comparison with the six low income EU countries, and in particular with the EU25 as a whole, both countries are characterised by a high degree of lifestyle deprivation, with many people being unable to meet basic needs such as keeping the home adequately warm, having a meal with meat every second day, replacing worn-out furniture and buying clothes, taking a week's holiday away from home or having friends over for a drink or meal at least once a month. The situation in this respect is particularly difficult for unemployed people and those living in rural areas.

The overall economic conditions also influence the extent of household production of food. In both countries, more than half of the respondents reported that they grow crops or keep livestock in order to meet basic needs. However, this type of subsistence agriculture represents a limited and short-term solution to difficult living conditions in Bulgaria and Romania. While it has proved to be a useful strategy in helping people to survive during the arduous transition years, it cannot be considered a long-term approach for development in these countries. The situation in the lowest income quartile is even more acute, with 64% of people in Bulgaria and 75% of people in Romania relying on own food production.

Despite the fact that many citizens have developed their own strategies to cope with economic strain, some 40% of the survey respondents in Romania and 61% of respondents in Bulgaria have difficulties in making ends meet. In this respect, Bulgaria is in a much worse situation than the six low income EU countries; both of the acceding countries are also far above the EU25 average (15%) in relation to perceived economic strain. Such disparities represent a major challenge for policymakers, particularly in relation to Bulgaria where a majority of people live in difficult economic circumstances and feel that they are poor. In particular, the poor standard of living of people in the lowest income quartile represents a key challenge.

## Housing and local environment

As in most of the other former communist countries, home ownership is very common in Romania and Bulgaria. This is largely the result of the privatisation of social housing in the 1990s, which enabled people to become home owners instead of remaining as tenants. In Romania and Bulgaria, some 84% and 85% respectively of the population now live in their own home, compared with 62% of the population in the EU25 and 75% of the population in the six low income EU countries. In addition, a large majority of householders in the two acceding countries own their home without any mortgage or loans, a factor which no doubt enables people to survive on smaller incomes.

In relation to the size of dwellings, people in Bulgaria and Romania have a significantly larger living space than citizens in the six low income EU countries have: in Bulgaria, the average number of rooms per person is 1.2 rooms while in Romania it is 1.3 rooms, compared with an average of one room per person in the six lower income EU countries. As to the distribution of living space, significant differences emerge between the two countries. In Romania, a significant proportion of householders (27%) live in very small houses of up to 50 square metres, while another significant proportion of people (23%) live in larger dwellings of over 100 square metres. This indicates a certain polarisation in terms of living space, which is not as evident in Bulgaria where the distribution seems more equal.

In general, housing quality is relatively low in Bulgaria and Romania. A shortage of space, in particular, is a frequently reported problem in these two countries, with 24% and 28% respectively of respondents citing this problem. In addition, houses are reportedly less comfortable and neighbourhoods less safe in these two countries. The situation in Romania in relation to quality of housing is significantly worse than that of Bulgaria: in Romania, 30% of households have problems with rotting windows (compared with 21% in Bulgaria), 29% have problems with damp and leaks (compared with 25% in Bulgaria), while 40% of households have no indoor flushing toilet (compared with 29% in Bulgaria).

With regard to environmental problems, a clear difference emerges between the findings for Bulgaria and Romania, on the one hand, and the averages for the six low income EU countries and the EU25 on the other. People in the two acceding countries complain much more frequently about air pollution, particularly those living in urban areas. In Bulgaria especially, almost one third of the respondents (20% of those living in rural areas and 40% living in urban areas) complain about poor water quality. Air and water pollution are most likely to compound the relatively poor health conditions of the population in Bulgaria and Romania and therefore require a rapid policy response. In relation to housing and the local environment, particularly in terms of the latter, the two countries should learn from the positive experiences of the EU Member States.



## Employment and training

The early 1990s were characterised by a relatively high unemployment rate in Bulgaria and Romania. From 2000 onwards, the situation started to improve. Since 2003, the unemployment rate has stabilised, declining to about 7% in Romania and 13% in Bulgaria, with very little difference between the sexes in this respect. However, the big challenge for Bulgaria, and to a somewhat lesser extent for Romania, will be to reduce the high level of long-term unemployment particularly among young people, those with low skill levels and older people. This will require the careful selection, targeting and effective implementation of specific measures arising from labour activation policies.

The sharp decrease in the unemployment rate of these two countries in the last four to five years is attributed to the strong economic growth and the creation of new jobs, particularly in the private sector, but it is also related to the relatively high level of emigration from these two countries to EU Member States. Since labour emigration is very selective in terms of age and education of the workforce (the 'brain drain' and 'skills drain'), large-scale emigration can result in serious disturbances to the domestic labour supply. Both countries should therefore pay greater attention to this issue and develop policies aimed at minimising the negative macroeconomic, demographic and social effects of emigration.

Despite the strong economic growth in recent years, both countries still have relatively low overall employment rates, at 58% in Romania and 52% in Bulgaria – between five and 10 percentage points below the EU25 average. In Bulgaria, the female employment rate is just below 50% and is one of the lowest in Europe. The employment rate of older workers in these countries is also below the EU average. Overall therefore, labour market participation in Bulgaria and Romania is quite low and should be a key policy concern in these two countries. Creating new employment opportunities is recognised as one of the major factors for facilitating social inclusion and cohesion. For this reason, increasing the labour participation rates of women and older people in particular, by 2010, represents one of the major objectives of EU social policy. However, this will not be an easy task for Bulgaria and Romania because of the relatively large proportion of total employment that is found in the agricultural sector (10% in Bulgaria and 34% in Romania). In the medium term, EU agricultural policy will put serious pressure on employment opportunities in the non-competitive farming sector in Romania, possibly leading to a large labour surplus in rural areas in particular; such a scenario may also occur to a lesser extent in Bulgaria.

On average, people in Bulgaria and Romania work longer hours than people in the EU25. Low wage levels and inflexible working time arrangements are seen as significant contributory factors in this context. For example, because of the low wage levels, people often try to increase their earnings by having a second job. Another reason is the relatively high level of employment in the informal economy, which is characterised by low pay, poor working conditions, the absence of flexible working time arrangements, high job insecurity and a low level of protection for employees in relation to working time. Therefore, employment in the informal economy is an area where much greater regulation and policy intervention is needed.

The perceived quality of jobs in Bulgaria and Romania – measured by pay levels, degree of autonomy at work and prospects for career advancement – is lower than that of the six low income EU countries and much lower than the EU25 average. In addition, the level of perceived job insecurity in these two countries is very high, particularly in Bulgaria where a half of employees believe that they might

lose their job within the next six months. In Romania, this proportion is lower, at 18%, but still twice the EU25 average. Along with the poor rights in relation to job protection and the large extent of the informal sector, the feeling of insecurity also seems to have been influenced by the unsettling experiences associated with the privatisation of the socialist economy, when thousands of jobs were lost.

In relation to training, the EQLS data indicate that only 5% of employees in Bulgaria and 12% of workers in Romania have undertaken training or participated in a course of some kind; this is very low compared with the 18% average for the six low income EU countries and the EU25 average of 21%. In fact, these figures are a significant cause for concern since investing in people through the provision of better education opportunities, more training and lifelong learning is seen as a key determinant for the competitiveness of EU economies. It is also considered an important factor for enabling people to access good quality jobs which, in turn, leads to greater social inclusion and increased cohesion. For all of these reasons, policymakers in Bulgaria and Romania should address these issues in a more proactive way and aim to create conditions that will promote and facilitate different forms of investment in human capital.

## Household structure and family relations

Bulgarians and Romanians live in relatively large households with an average of 2.69 persons and 2.92 persons per household respectively, compared with the EU25 average of 2.46 persons per household. There is also a relatively high proportion of multi-generational households in these two countries, where children, parents and grandparents live in the same house. Conversely, the proportion of single-person households is low compared with the EU level. Household patterns are determined by cultural but also social and economic factors. Due to the high unemployment levels and low levels of pay, many young people in Bulgaria and Romania cannot afford to live independently and therefore remain for longer in the parental home, compared with their counterparts in western European countries. Factors strongly contributing to the relatively high proportion of multi-generational households in these countries are housing problems and lack of childcare facilities especially for young parents, along with the low level of remuneration in the pensions of older people. Essentially, larger families are better able to cope with economic problems in these two countries because of the support offered by family members during difficult times.

Intergenerational solidarity among families in Bulgaria and Romania is also manifested in people's care for children and elderly persons; in these two countries, caring activities are performed by the family to a greater extent than in the six low income EU countries and the EU25. While elderly people are usually cared for by the family, at the same time, older people also play a very active role in caring for children. This form of support partly compensates for the poorly developed social services in these countries.

Housework, childcare and care of elderly family members are tasks that are usually carried out within the household, mostly by women. Among all of the 28 countries covered in the EQLS, Romania ranks first in terms of the highest number of daily hours devoted to housework. Bulgaria scores somewhat lower in relation to this indicator and shows a rate closer to the average of the six low income EU countries. The number of hours devoted to childcare and care of elderly people is also higher in Romania. Economic constraints on the one hand, and a lack of private and public services

on the other, are considered to be the major reasons compelling family members to take responsibility for such tasks. In many cases, particularly in relation to women, these responsibilities prevent people from participating in the labour market. Therefore, ensuring better access to and developing different forms of childcare and elderly care services should be high on the agenda for policymakers in Bulgaria and Romania.

Generally, family is the main source of social integration and support. People rely first and foremost on family members in difficult situations like illness, depression, or when in need of advice. Bulgaria and Romania differ from other European countries with regard to the weaker dependence on friends in comparison with the EU25, displaying a social life characterised by relationships within primary groups and less developed social networks in the society. Of all the countries and country groups under study, Romania is most noteworthy for its strong reliance on family.

### **Work–life balance**

Reconciling work and family life is an important issue on the EU policy agenda, which aims at increasing women's participation in the labour market, as well as enabling family care of children or dependent adults. In Bulgaria and Romania, reconciling these two aspects of life is particularly difficult, given the unusually long hours that people in these countries work. Women in particular face a high burden in this respect. In Bulgaria and Romania, the proportion of women working more than 48 hours a week is close to the respective proportion of men; however, in the EU25, twice as many men than women work long hours each week. At the same time, due to the distribution of roles within the family, women in Bulgaria and Romania also devote more time to housework than men do and more often have responsibility for childcare and care of elderly people. In order to change this pattern and to increase the labour participation of women, the governments of these two acceding countries should guarantee stronger support for the provision of different care services. They should also make greater efforts to develop and implement flexible working time arrangements that enable women to better combine their family responsibilities and their professional careers.

The EQLS data confirm that balancing work, family and social commitments represents a difficult task in the two acceding countries. More than a third of the survey respondents in Bulgaria and Romania reported that they were too tired after coming home from work to carry out any household tasks – a level that is above the average of the six lower income EU countries and higher again than the EU25 average. Similarly, a higher proportion of people in the two acceding countries, compared with the six lower income EU countries and the EU25 as a whole, reported that they had difficulties fulfilling family responsibilities because of spending too much time at work. In such a context, it is easier to understand why people in Bulgaria and Romania complain more frequently about not having enough time for social contacts, hobbies and personal interests, compared with people in any of the EU Member States.

The difficulties experienced in maintaining a work–life balance have a large impact on people's satisfaction with their work, family and personal lives – all of which are important dimensions of quality of life. The social partners in both Bulgaria and Romania should therefore consider creating and offering new possibilities for balancing family, social and work life. Employees should be offered greater choice in setting their work schedules through the introduction of more flexible working time arrangements. Women should be given more opportunities to enter or remain in the labour market,

for example through the provision of more and better quality care services. Labour market regulations and social security provisions should ensure that people have the opportunity to return to full-time work in order to reduce the risk of poverty in old age. Although both countries have already taken steps in this direction, greater efforts need to be made to increase the social acceptance and take-up of flexible working time options and to create conditions more conducive to job and income security. Failure to do so may hinder the efforts aimed at increasing labour market participation and at improving people's overall quality of life.

## Health and healthcare

Being in good health is an essential precondition for a high quality of life. According to the EQLS, the health status of people living in Bulgaria and Romania is below the EU25 average. A poor health status in Bulgaria and Romania is reported by 15% and 16% of the respondents respectively – about twice the proportion of the EU25 average. Moreover, a quarter of the total adult population in Bulgaria and Romania report that they have a longstanding illness or disability that prevents them to some extent from leading an active and independent life. These findings on subjective health status correspond fully with objective indicators on health: the two acceding countries have a lower life expectancy than any of the EU25 countries – with the exception of Latvia – and among the highest infant mortality rates.

Elderly citizens in Bulgaria and Romania most often report a poor health status. Low income groups, unemployed people, those with a poor education and people living in urban areas are also at increased risk of having health problems. With the exception of the urban population, the level of satisfaction with personal health in all of the aforementioned groups is also below the national average.

In relation to access to health services, people living in Bulgaria and Romania cite more problems accessing such services than people in the EU do in general. Bulgarians complain most about the distance to a doctor's office and about the delay in getting an appointment: two out of five Bulgarians who needed medical services reported that they found it 'very difficult' to access medical care from the point of view of these two aspects. One third of the respondents in Bulgaria cited difficulties in accessing health services due to the high cost involved. This figure is among the highest in the EU25 and two acceding countries. Meanwhile, in Romania, people complained most often about the costs involved in seeing a doctor: altogether, 29% of the people who needed medical services reported difficulties in accessing health services due to the high cost of these services.

The perceived quality of health services in the two acceding countries, particularly in Bulgaria, is much lower than that of the EU. In Romania, the respondents gave an average score of 5.6 points (on a scale of one to 10, where one means very poor quality and 10 means very high quality) when rating the quality of health services. Although this is higher than the corresponding score of five points in the six lower income EU countries, it is significantly lower than the average score of 6.2 points in the EU25. At just 3.5 points, Bulgaria scored the lowest of all the countries studied, underlining the need for a rapid response by all the relevant actors in this country to improve the quality of health services. Given the budgetary constraints of both of these countries and the restrictions on public spending recommended by the International Monetary Fund and the World Bank, improving the quality of health services will not be an easy task. Nevertheless, a key priority

for these countries in the coming years should be to enhance access to health protection and to ensure that all citizens have access to basic medical services. Special schemes should also be developed for the most vulnerable groups in society, such as children, elderly people, and those on low incomes. In addition, a greater focus should be placed on health prevention programmes and on health education in the longer term.

### **Subjective well-being**

People living in Bulgaria and Romania have among the lowest standards of living of all the countries covered in the EQLS. Lower living standards, in turn, negatively affect people's subjective feelings about their lives as a whole and about various aspects of their lives. In Bulgaria in particular, the respondents reported low levels of subjective well-being. Both of the acceding countries lag behind the older EU Member States in relation to subjective well-being, thus mirroring the existing disparities between these two country groupings in relation to objective living conditions such as: financial situation, standard of living, working conditions, time use, health and quality of society.

Life satisfaction is generally regarded as the final output of all circumstances that people experience in their lives. In Bulgaria, the score for life satisfaction is the lowest among all the countries analysed, at just 4.5 points (on a scale of one to 10, where one means very dissatisfied and 10 means very satisfied), compared with an average score of six points for the six low income EU countries and an average of 7.1 points for the EU25.

In Romania, the average score for life satisfaction is considerably higher than in Bulgaria, at 6.2 points. A similar situation is found when people's optimism about the future is considered. In Romania, two-thirds of people are optimistic about the future, while in Bulgaria less than half (47%) of the respondents are optimistic about their future. The fact that people in the two countries have different responses to essentially similar material conditions reflects the reality that their assessment also includes their expectations and values, as well as their experiences from the past.

In relation to people's experiences and expectations, it is worthwhile referring to the recent history of Bulgaria and Romania. Although both countries had long-term experiences of communism, they took slightly different paths in this respect. Bulgaria experienced a less strict communist regime, with a rather painless departure from its autocratic past; as a result, it had a better starting point in relation to its economic transition compared with Romania. However, this transition proved to be extremely difficult and involved economic crises that led to high social costs which also impacted negatively on individuals themselves. Thus, transition in Bulgaria was largely far more difficult than expected and led to a sharp deterioration in living conditions, including increased job insecurity, unemployment and poverty. In this sense therefore, the low level of subjective well-being in Bulgaria can be linked to the conditions and feelings of disappointment that people experienced following transition.

Conversely, Romania was ruled by one of the most severe communist regimes in east Europe; in contrast with Bulgaria, the overthrow of this autocratic system was traumatic and the starting point to transition was rather low compared with most former communist countries. Although the transition also proved difficult in this country, it was accompanied by less extreme crises and a relatively slow pace of reform. By 2000, the country began to witness the first signs of economic recovery, an improved political environment, and more targeted and efficient social protection measures. These

positive changes may partly explain the increased sense of optimism that was reflected in the findings of the EQLS survey, conducted in 2003, and the reason why people's subjective well-being is higher in Romania than in Bulgaria.

Nevertheless, in both countries, certain groups of people are relatively more disadvantaged in terms of subjective well-being. For example, the level of life satisfaction among unemployed people, those on low incomes, and people with low skill levels is below the national average. However, the lowest figures in this respect are to be found among older people – a clear signal that policymakers need to identify measures aimed at this particular target group. Life circumstances for many people in this group are very negative. The economic transition has impacted on this category by interrupting their work biographies and disrupting their way of life, while other features like the sharp drop in incomes, poor health, social isolation, and the lack of services for elderly people have all adversely affected their subjective well-being.

### **Perceived quality of society**

Determining the quality of the social context in which people live complements the picture of people's objective living conditions and subjective well-being. The conditions in the different societies influence people's life strategies and impact decisively on the quality of their lives. For instance, countries in which citizens have little trust in others, where there is poor social capital, where people perceive tensions between various groups, and where public services are of low quality are not likely to encourage positive life strategies.

In Bulgaria, people's perception of the quality of society is extremely low: at individual level, people have little trust in others, often feel alienated and lost in society, perceive their own communities as not being very safe and evaluate the quality of social services as being very low. This perception largely corresponds with the generally low scores for all subjective indicators in Bulgaria. In Romania, people have a less negative perception of the different aspects of the quality of society than is found in Bulgaria. However, both countries are still far behind the EU in this respect, where a much lower proportion of citizens feel alienated, lost or unsafe, and where the quality of social and health services is perceived to be much better.

More specifically, people in Bulgaria and Romania are concerned about tensions in society, particularly tensions that reflect traditional social divisions, for example between rich and poor people, and between management and workers. These tensions are related to the increased income inequalities and material polarisation experienced in the two countries. Reducing the gap between rich and poor people therefore constitutes one of the key challenges for both of these countries. However, in relation to tensions between different ethnic groups, Bulgarians do not perceive this to be a serious issue. Only 13% of the respondents in this country perceived a lot of tensions between ethnic groups; with the exception of Lithuania where a smaller proportion of 10% cited such tensions, the figure for Bulgaria represents the lowest figure among the countries covered in the survey. In Romania, the proportion of people perceiving a lot of tensions between ethnic groups is much higher, at 33%; this may be linked to the higher level of ethnic diversity in the country, such as the large Roma and Hungarian ethnic groups.

The perceived low quality of health and social services in the two acceding countries also reflects the low level of government spending in these areas. In Bulgaria, the quality of education and public

transport is also perceived as being relatively low. Despite improvements in these services in recent years, much work remains to be done in this area. One of the big challenges for governments in Bulgaria and Romania is to reduce the extensive informal sector. A high degree of tax evasion in the informal economy makes it far more difficult to finance the necessary reforms in the social security system, and in education and health, and to improve the overall quality of these services.

A low evaluation of the quality of society in Bulgaria and Romania has its roots in the economic, social and political context of these two countries. The countries' transition has led to profound changes in economic and social structures, which are often associated with negative processes such as a weakening of social control, increased crime, widespread corruption, and greater income inequalities and polarisation. All of these factors, in turn, seem to have affected the feelings of people in Bulgaria and Romania in relation to the quality of the society in which they live. Many people feel marginalised or disoriented, see their lives as being shaped by factors that are outside of their own control, often feel unsafe, and perceive their country as being without normal social standards. While there are no simple solutions to these problems, it is likely that creating certain conditions – such as the sustainable functioning of the market economy, more rapid economic growth, job creation, the modernisation of social services, a more socially acceptable redistribution of income and better law enforcement – will contribute to a better quality of society and to the improved quality of life of citizens in Bulgaria and Romania.

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