

Economic and social policies impacting on the social under-development – case study: mining restructuring in Valea Jiului¹

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Abstract

The paper I suggest is based on the preliminary results of the research project Deindustrialization and under-development in the Romanian Transition. Individual/Collective Strategies/ Reply Policies. Case study: Valea Jiului, that will be done within the project ID- 141086 „Pluri- și interdisciplinaritate în programe doctorale și postdoctoralele” This project is constructed from the perspective of the social development paradigm. The modernization theories suggest the paradigm of development as modernization from an evolutionist perspective. While the communist project of social development chose explicitly industrialization as a corollary of modernization, such process of (post) modernization initiated in the moment of the communism' collapse. On economic level the transition meant also a continue and emphasized process of de-industrialization illustrated by the constant decrease of the number of industrial employees from maximum 4 millions in 1990 to 1,2 millions of employees in 2011 (data source: Zamfir s.s., coord. 2011). In the same time a transfer of the agriculture employees to the subsistence agriculture was registered (now the employees represent only ,2% of the total persons working in agriculture – MADR, 2013). The high reduction of the percentage of employed population represents a factor generating under-development and has a negative impact on the balance of the social insurance systems (pensions, unemployment, health). This paper intends to describe and analyze a special case of the communist under-development from the perspective of causes, factors and mechanisms of this process located in the region Valea Jiului. The selection of the mining restructuring in Valea Jiului is based on the fact that this represents an example of failure of the social policies aiming to reduce the effects of the transition (effects increased in the respective case exactly by the manner of implementation of certain economic policy measures).

Keywords: underdevelopment, social policies, economic policies, mining restructuring

Introduction

Romania is experiencing for the past two and a half decades a process of social transformation with effects on the general society and on its major components. One of the basic transformations pertains to the relation between state and economy – from the all present interventionism to a policy of almost total absence of the state in planning the economic policy.

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On economic level the transition meant a continue and emphasized process of de-industrialization illustrated by the constant decrease of the number of industrial employees from maximum 4 millions in 1990 to 1,2 millions of employees in 2011 (data source: Zamfir s.s., coord. 2011).

The significant decrease of the number of employees after 1989 was generated mainly by the reduction of the number of employees from the industry, which had not been absorbed by other economic sectors and they vanished from the formal labour market.

The decline of the industry leded also to half the number of employees who run shuttle service (most of them living in the rural area) between 1990-2002, mainly from the extractive industry and energy, which produced 100.000 unemployed in 1995-1997 (Bleahu, 2004, p .91).

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The reduction of the number of employees continued even during the period of economic increase and the in first year of economic crisis in Romania (2009) almost 300.000 employees from the industrial sector lost their jobs.

In the same time a transfer of the agriculture employees to the subsistence agriculture was registered (now the employees represent only ,2% of the total persons working in agriculture – MADR, 2013)

The high reduction of the percentage of employed population represents a factor generating under-development and has a negative impact on the balance of the social insurance systems (pensions, unemployment, health).

On the other side, the manner of development of the Romanian transition led to the increase of regional disparities and generated enclaves of under development

The forms of underdevelopment are diverse and refer to different levels of aggregation from communitarian to local and regional.

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This project is constructed from the perspective of the social development paradigm.

The general objective of this project is circumscribed to the accomplishment of a typology of underdevelopment in post – communist Romania. The accomplishment of such a typology comes from the necessity to have an innovating tool of shaping the strategies and the policy of response to the negative impact of social transformations. The increase of social polarization and local disparities as effects of un-industrialization and return to agriculture, illustrates on one side the development of a certain pattern of the strategies of response to social transformations and on the other side the low efficiency of the policy of support for the groups affected by the transition.

The increased percentage of the precarious occupation like the subsistence agriculture in the detriment of modern occupation together with the inefficiency and insufficiency of the active measures of support of occupation represent two factors that stop the social development.

A first stage in this endeavour of making a typology is the analysis of the communitarian problems and the concrete and differenced (on local level) manners of function of the socio-economic mechanisms with impact on the social development. The identification during several case studies in rural communities of some communities with similar level of development, both in poor and rich areas shows the existence of some mechanisms of communitarian underdevelopment following a common structural logic which can be found even in the developed areas of the country.

Based on the results of these case studies I made a preliminary analysis of the mechanisms and factors with impact on the social development and the manner how certain particular contexts intensify this impact (Preotesi, 2014).

This project involves an extension of the underdevelopment perspective by including the issue of the urban underdevelopment and, in the same time, a different approach of the underdevelopment.

The integrate (rural-urban) approach on local level of the underdevelopment intends to observe the “fine mechanisms” of the interaction rural-urban in the process of (under)development. In other words, in the analysis of the mechanisms of the underdevelopment the reference of the rural communities to the urban which irradiates development (Sandu, 1999), will be completed with the analysis of surviving valves offered by the rural to the urban subjected to some process of social disaggregation.

The specific objective of this project is to describe and analyze the specific case of the post-communist underdevelopment from the perspective of causes and mechanisms of this process located in Valea Jiului. Beyond the specific of the issue of underdevelopment, the choice of this study case is based on the fact that it represents a model of failure of the social policy of attenuation of the economic impact of the transition (impact amplified in the respective case by the manner of implementation of some measures of economic policy).

Restructuring the mining on Valea Jiului on a very short period of time and the high percentage of the passive measures of support for those fired transformed “over night” almost half of the employees in the area in assisted population following a classic pattern of acute social dependency: compensatory salaries- unemployment benefit- social aid (model explained by Septimiu Krausz, în Zamfir, Zamfir, Bădescu, coord., 2000, p.343).

The effect of these policies from the perspective of social underdevelopment is perfectly illustrated by the current situation of Aninoasa, first town in Europe in insolvency and which need sponsorship to finance the organization of a referendum to decide the return to the status of village (cf. Stegar, 2014).

The current state of the domain

The scientific literature referring to the project's theme can be included in the following categories:

- social development
- communitarian development, particular case of the social development
- urban development
- the perspective of social policies of support addressed to the vulnerable groups.

Within the specific context of Romania the theoretic frame is defined by the perspective of the so called sociology of transition.

In Romanian sociological literature authors like Dumitru Sandu (1994,1999), Ioan Mărginean (2001, 2004), Cătălin Zamfir(1994, 2007), Vladimir Pasti (1995, 2011), Lazăr Vlăsceanu (2001, 2007), Mălina.Voicu (2004), Bogdan.Voicu (2005) present models explaining the social processes and mechanisms of the post-communist transition in Romania.

The paradigm of social development contains two types of approaching the underdevelopment starting from the relative importance paid to the endogenetic or exogenetic factors as determinants of the underdevelopment and based on two theories: the theory of modernization and, respectively, the theory of dependence.

The theories of modernization sustain the paradigm of development as modernization according to an evolutionist scheme. The theories of dependence developed by Frank(1966), Cardoso(1972) sau Wallerstein (1994), emphasize the role of external factors as determinant of underdevelopment emphasizing the unbalanced and inequitable power relations among states generating and maintaining the discrepancy among the developed and underdeveloped countries.

A domain well represented in the Romanian sociological literature dedicated to the transition is that pertaining to the so called external agents of development. In this category are institutions like The World Bank, International Monetary Fond, European Commission. These analyses pertain both to the ideology and theoretic approach of social development promoted by these institutions and to the impact of their programmes. The strategy of development promoted by the World Bank and FMI for the European countries in transition is based on reducing the role of the state in eradicating the underdevelopment and increasing the role of other actors of development like the local communities and ONG. If as regards the first part this was materialized in reduction of the state' involvement in economy, the expected effects of the second part of the development strategy did not match the expectations, a lack of balance leded to disintegrating process like the deindustrialization of the country.

The failure registered by the World Bank in implementing some programmes of development leded to a rethinking of the importance of social capital as a condition of the success of the programmes of economic development (Preotesi, in Zamfir, Stănescu, coord., 2007, p.565-566).

The communitarian development represents a particularly case of social development.

The concern for measuring the communitarian development materialized in the elaboration of local index of development. The models of measurement the local/communitarian development are based on some synthetic index made as factorial scores of some sets of socio-economic indicators. Such model of measurement made Dumitru Sandu (Sandu, 1999)

As regards the social development of the towns this is approached in the Romanian scientific literature from different perspectives – economic, urban sociology or urban geography.

The mono-industrial towns present a special interest for this project. Valea Jiului is an area of constant presence among the mono-industrial towns since the first half of the last century (Dumitrescu, 2007). The moment of accelerate restructuring of the mines on the second half of 1997 represented due its socio-economic effects a domain of interest valued in a well represented scientific literature. Reference works made from economic perspective like that of Mircea Coșea (Coșea, 2000), or from sociological perspective like Dîncu, Rotaru ș. a., 2000), together with the constant work of the research teams from the University of Petroșani and the Social Institute Valea Jiului (Krausz, 1999, Stegar 2007, 2014) represent a basic source for my research in this project.

I shall consider mainly the results of the research made in Valea Jiului on representative samples or even on the entire population of miners employed or unemployed.

The preliminary analysis of the data

The preliminary analysis of the data offered some hypothesis and premises for the intended analysis.

A more general hypothesis is that the influence of the structural factors like the lack/shortness of alternatives to mining on the labour market in Valea Jiului is mediated by some factors specific to the local population and context.

Among these factors are certain categories of the working force dismissed/to be dismissed.

An interesting direction of analysis is comparing the expectations and the behavior of the miners dismissed in 1997 and the expectations of those waiting to be dismissed from the three mines that will be soon shut down (Petrla, Paroşeni, Uricani)

The analysis of the data collected a year after the massive dismissal in 1997 on a representative sample of 850 dismissed miners shows a profile of those dismissed characterized by many vulnerabilities towards the reintegration on the labour market.

Some of these characteristics are (data source: Krauss, 2000, Stegar, 2000):

- low education-low qualification/ mining
- average age relative low- to young to be retired soon (over 50% are under 35 years -cf. Krauss, 2000)
- low mobility of the working force – third of them would accept a job only in Valea Jiului and 17% only in the residence locality.
- high and unrealistic salary expectations considering the level of education, qualification and the job offer (90% said in 1998 that they would not accept a salary below the average salary, more than half would accept a salary at least 50% higher than average -cf. Stegar, 2000)
- less than half said they intend to get a job in the near future (86% had worked a year after the dismissal but almost three quarters of them only in daily or occasional jobs -cf. Krauss, 2000)

The data collected in 2012-2013 (presented and analyzed in Stegar, 2014) on a representative sample of miners in Valea Jiului containing over 60% of the total reference statistic population offer several interesting conclusions compared with the data collected in 1998:

- even though the average age of the miners is increasing, the percentage of those over 50 years is one extremely low (under 10% on total and under 7% in the case of the mines to be closed). The natural exit from the system by retiring does not represent a valid alternative for most of those to be dismissed and the high percentage of those over 45 years emphasized the vulnerability of those dismissed towards the integration on the working force market.
- the average level of education is higher than in 1997, the percentage of those without high school education is still important (almost 50%, a little higher at Petrla și Uricani and only 35% at Paroşeni);
- less than half of the miners said that they would search for a job if they would be dismissed and over a fifth would be involved in their own household, mainly in subsistence agriculture (Stegar, 2014);
- more than a third of the miners would search for a job only in Valea Jiului and over a fifth would search for a job abroad. Even if the percentage of those that would get a job anywhere in the country (31,95%) reveals a high opening towards the mobility within the national context, if we consider that 50% do not search for a job – this alternative can not be considered major.

Beyond comparing the expectations and the behavior of the two moments of dismissal in mining it is also useful to analyze these data within the general context of the interaction of the unoccupied persons with the labour market to emphasize the specific of the situation.

Attitudes and behavior in the interaction with the labour market of the unoccupied persons regarding the territorial mobility .

In a recent published report (AJOFM Mureş, 2013) we find the result of a survey on the mobility of the unemployed. These shows that almost 2/3 of the interviewed unemployed persons do not consider the territorial mobility a valid alternative for obtaining a job. A quarter of the interviewed persons said that they would accept a job in a place located at over 50 km

away from their current location, 7,73% would accept a job anywhere in the country and 8,25% would go abroad for a job. One of the most important motive for this acceptance is the salary – a motivating salary package is considered the basic condition for 80% of the interviewed persons. This package would represent also a compensation for the discontent caused by the shuttle service, respectively relocation, but also a compensation for the costs of this alternative. This compensation is not really offered by the measures for stimulating the mobility of the working force (bonus for mobility stipulated by the Law 76/2005).

These conclusions are similar with the results of an analysis of the interaction models of the unemployed persons with the labor market (developed in Preotesi, 2012) based on the data obtained in the project „Proactiv-de la marginal, la exclusiv” (ICC-CATALACTICA, 2009-2010)-.

This analysis takes some of the conclusions of the above mentioned research report but the analysis refers separately to South West Oltenia and Muntenia, while here these two regions are analyzed together.

The data resulted from the survey undertaken in the counties composing the two regions reveals certain profiles of attitude and behavior of the unemployed persons towards the (re)integration on the labor market.

The percentage of those that had a job offer within the past year is very low (under 9% for each of the regions). This shows the low offer of jobs. The quality of jobs is also low, inadequate to the specific and expectations of the potential working force. Even if the number of available jobs was low only the fifth part of the persons accepted these offers. More than a third part of those declining the offer motivated their refuse by the low salary, close to minimum wage, in most of the cases (most of the jobs were for under qualified persons).

On the other side, the analysis showed that most of the unemployed persons did not searched for a job within the past year (68,5% of the interviewed persons in both regions).

The intention to search/not search for a job depends statistical on many socio-demographic variables like: the occupational status, age or number of children.

The profiles of the unemployed persons, attitude and behavior towards the integration on the labor market offer several interesting aspects for this analysis.

If the profile of that who does not have, but searched for a job within the past year is that of a young person, up to 35 years, no children, with precarious resources, without unemployment benefit, the profile of the one who does not have, but did not searched for a job within the past year is sensible different. This last one is between 49-62 years old, lives in a household where the monthly expenses are at least of 2000 lei, he owns his house and his is retired on medical reasons or benefits of unemployment. Hence, a sure income conditioned by the current occupational status represents an inhibitor of the searching behavior. Disregarding those with medical condition, we may consider that these persons have a behavior oriented on maximized the utility on short term.

For the analyzed population, characterized by a high level of social vulnerability, this strategic choice is dictated rather by serious problems regarding the immediate subsistence than by individual characteristics, hence this choice is more or less a forced one. Within this context we have a difference of motivation between the two categories, while one category base their choice on the total lack of resources, those on the other category have at least the possibility to choose. The pressure imposed by the need and the low job offer determine those in the first category to accept jobs on the informal labour market as daily workers or on the black labour market, which solve partially the problem of subsistence on short term, but the lack social protection and of legal protection against the employers' possible abuses creates vulnerabilities.

The choice made by those in the second category to maximize the short term utility and maintain the social vulnerability on long term is also a forced one. The real difference between the salary that could be earned and the unemployment benefit is very low and does not represent a motivation to change a status with sure benefits, no costs, even on a limited period to a status with less sure benefits, on an unspecified period of time, but with higher costs and efforts. The time of the unemployed represents an important resource that may be used to increase the income by alternative activities like agriculture in the personal household or as a daily worker.

Those retired on medical reasons might go back to work but they have the same dilemma as the unemployed persons – to renounce to a benefit obtained without any effort and to the free time that could be transformed in money for a just a little higher income, still insufficient and that can not be increased because they would not have the free time.

On the other side, more general arguments like the low offer of jobs and the low salary are intensified by the personal experience and the failures in (re)integrating on the labor market increase the lack of confidence and lead to a blasé state

and an associated passive behavior" (Mihnea Preotesi, Iulian Stănescu, în Căce, Arpinte, Scoican, coord., 2010, p.149-150).

Most of those who would get a job said that acceptable salary is 1000 lei net. This value is less the average in both regions, but double than the minimum wage.

The salaries offered to unemployed persons are not satisfying these minimal demands of subsistence

As regards the salary expectations the hypothesis that will be tested in this project is that the salaries decrease compared with those expressed in 1997 as a consequence of experiencing their own inadequacies, but they are still high comparing to the real offer on the working force market. Among the basic premises of this hypothesis are the relatively high salaries from the extractive industry comparing with the processing industry and the average salary on economy. According to the collected data the expectations of some dismissed employees start from salaries higher than average and decrease in time to the average salary.

Tble1. The structure of brut/net average salary on sub-sectors (February 2012)

Economic sector/subsector	Average salary brut (lei)	Average salary net (lei)
Total economy	2028	1472
Extractive industry	3540	2510
Processing Industry	1834	1340
Hotels and restaurants (HORECA)	1116	824
Research-development	3110	2232
Public Administration No Army	2617	1870
Education	1768	1270
Health and Social Assistance	1697	1235

Data source: INS, Press release nr. 75/4 April 2012

The analysis of the above data must take into consideration the fact that the salaries of the miners in Valea Jiului are on higher level than other employees in extractive industry. The obtained salaries are higher than the base salaries and the difference between these salaries and that from other sectors is an important one as may observe in the table below.

Table 2. The medians of the distribution of brut/base salaries on sectors and types of employees

(Sub) Sectors of activity	Number of workers	The median of brut base salaries/worker (lei)	The median of brut obtain salaries/worker (lei)	Number of employees Other than workers	The median of brut base salaries/non worker (lei)	The median of brut obtain salaries non worker (lei)
Processing Industry	632.938	701- 1000	1001-1500	188.250	1501-2000	1501-2000
Extractive industry	38256	1001-1500	3000-3500	16.250	2001-2500	4000-4500
HORECA	52628	701-1000	701-1000	29.624	701- 1000	701-1000

professional scientific and technical activities	16.864	701-1000	701-1000	67.513	2001-2500	2001-2500
Public administration	63.383	601-700	601-700	219.608	1001- 1500	1001-1500
Education	42.008	601-700	700-1000	308.518	1001- 1500	1501-2000
Health and Social Assitance.	47.075	701-1000	701-1000	207.573	1001- 1500	1001-1500

Data sources: The authors calculation on the results of the research regarding the distribution of the employees on salary groups (INS, October 2011)-apud.Preotesi, 2012.

The lowest level of median salary (601-700 lei) corresponds for the obtained salaries and for the base salaries to the budgetary domain public administration and education, for workers, respectively the domain hotels and restaurants (HORECA) (701-1000), for the non worker category.

On the other side, the data confirm the existence of a dual labour market in the industrial domain. If we center the medians we obtain an average median of 2,4 times higher in extractive industry compared to processing industry both for workers and non workers.

The multiplication of the higher salaries in the second group with a similar percentage makes the differences between the two sectors even higher. Also, the group of the non workers in the extractive industry is the highest median. The differences compared to the three budgetary categories can be considered as excessive high considering that this sectors are not so much affected by the free market mechanisms, the index of multiplication is over 3 compared with the health and public administration sectors and 2,4 compared with education.

For two groups of employees where the percentage of University educated persons is higher than the other domains, most of the employees from the non worker category earn brut salary of 1001-1500 lei, net 720-1020 lei, and most of the net salaries in education are below 1250 lei.

The salaries in Hotels and Public Nutrition (HORECA) are under 1/3 of those in the extractive industry, which is interesting because the alternative to mining in Valea Jiului is the tourism; 100 of boarding houses were built here. One of the question I shall try to answer by collecting qualitative data is to what extend the dismissed miners are among the owners of these boarding houses.

Conclusions

Within the context of the relation between deindustrialization and underdevelopment in this preliminary phase of the project several elements will constitute the basis of the analysis. One of the important indicators of the trend to underdevelopment is the reduction of the number of employees in Valea Jiului caused by the drastic reduction of the mining, the main economic activity. From 50.000 employees in 1989 today are only 7500 and almost 2000 will be soon dismissed from the closing mines (Paroşeni, Uricani and Petrila).

The alternatives to mining developed in the past two decades proved to be non-viable economic or social. An example of declassification on communitarian level is Aninoasa where the socio-economic effects of closing the mine in 2005 were not compensated by economic alternatives and the effect was the declared insolvency of this urban locality that will be reduce to the status of village.

An other indicator that represents premises of the underdevelopment is the evolution of the manner of referring of the miners to the alternatives they would access in case of dismissal.

On the moment of massive restructuration of the mining in 1997 only for 1,5% of the future dismissed the agriculture (mainly of subsistence) was considered a viable alternative. A year after dismissal, almost one third of them had chosen this alternative (cf.Krausz, 2000).

According to the data collected in 2011-2012 we notice a significant increase of the percentage of those who would choose this alternative, more than a fifth of the interviewed persons, which is more than the number of owners of households exploited for the subsistence agriculture (cf. Stegar, 2014).

The evolution from stable occupation well paid to non occupation or precarious occupation is reflected from the socio-economic reality towards the subjective reality in people's expectations. Within this context one of the most important dimensions to be explored in this project is that of the impact of the deep process of deindustrialization in Valea Jiului on psycho-sociological plan, on individual, collective and communitarian level.

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