DOI: 10.47743/ASAS-2022-1-690

CHALLENGES OF SOCIAL BENEFITS SYSTEM FROM ROMANIA IN THE PERIOD 2010-2021

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Abstract

This paper aims to analyze the evolution of the social assistance benefits system starting from 2010 and 2011, as in this period were approved normative acts of particular importance for social protection in Romania, respectively special laws and their application rules.

Through the secondary data analysis, I analyse of the changes, in the period 2010-2020, of the main social assistance benefits supported from the state budget, respectively of the granting conditions, of the way of determining the amount and payment of the benefits, as well as the rights and obligations of different categories of beneficiaries. The dynamics of social benefits payments for ten years show increases, changes in legislation and different effects on the number of beneficiaries in payment. The effectiveness of these social benefits is worth analyzing in future studies, starting from these comparative data.

Keywords: social benefits, dependency, social aid, Romania, social work.

Resumé

Le étude vise à analyser l'évolution du système de prestations d'assistance sociale à partir de 2010 et 2011, puisque dans cette période ont été approuvés des actes normatifs d'une importance particulière pour la protection sociale en Roumanie, respectivement des lois spéciales et leurs règles d'application. A travers l'analyse secondaire des données, je fais une radiographie des changements, dans la période 2010-2020, des principales prestations d'assistance sociale supportées par le budget de l'Etat, respectivement des conditions d'octroi, de la manière de déterminer le montant et paiement des prestations, mais aussi les droits et obligations des différentes catégories de bénéficiaires. La dynamique des versements de prestations sociales depuis dix ans montre des augmentations, des changements de législation et des effets différents sur le nombre de bénéficiaires en paiement. L'efficacité de ces prestations sociales mérite d'être analysée dans de futures études, à partir de ces données comparatives.

Mots clés: prestations sociales, dépendance, aide sociale, Roumanie, assistance sociale.

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Rezumat

Articolul își propune să analizeze evoluția sistemului beneficiilor de asistență socială începând cu anii 2010 și 2011 întrucât în această perioadă au fost aprobate acte normative de o importanță deosebită pentru protecția socială din România, respectiv legi speciale și normele de aplicare ale acestora. Prin analiza secundară de date realizăm o radiografie a modificărilor, în perioada 2010-2020, a principalelor beneficii de asistență socială suportate din bugetul de stat, respectiv a condițiilor de acordare, a modului de stabilire a cuantumului și de plată a prestațiilor, dar și a drepturilor și obligațiilor ce revin diferitelor categorii de beneficiari. Dinamica plătilor beneficiilor sociale timp de zece ani arata creșteri, modificări de legislație și efecte diferite asupra numărului de beneficiary aflați in plată. Eficienta acestor beneficia sociale merită analizată în studii următoare, pornind de la aceste date comparative.

Cuvinte cheie: beneficia sociale, dependenta, ajutor social, Romania, asistență socială.

1. Introduction

Romania has an extremely complex system of social assistance, which addresses to some wide range of population and to a large number of beneficiaries. The Romanian system of social assistance is expensive, requiring great institutional, as well as budgetary efforts. It consists of the system of social services and the system of social assistance benefits, the two systems being complementary.

This paper aims to analyze the evolution of the social assistance benefits system starting from 2010 and 2011, as in this period were approved normative acts of particular importance for social protection in Romania, respectively special laws and their application rules.

The benefits of social assistance are regulated through special laws, and through social benefits, the state intervenes for supplementing or substitute the primary incomes of a person, of a family. The state provides these social benefits through central or local public authorities, in accordance with the provisions of the legislation in force.

The social assistance expenses register an increase in the allocated amounts every year, an increase that is due to the introduction of new social benefits, to the increase in the eligibility thresholds in granting of benefits as a result of the application of policies to increase the birth rate and reduce poverty, as well as to the generosity shown around the local or general elections by the governing parties in order to obtain popular support. All these changes brought to the social benefits system aim to reduce extreme poverty, but also to increase the quality of life of certain categories of persons (Soitu 2020; Soitu, Soitu, 2020).

1.1. Concepts and methodology

The law of social assistance classifies the social assistance benefits, depending on their purpose, like this:

a) benefits of social assistance for preventing and fighting poverty and the risk of social exclusion: the minimum guaranteed income, the allowance for supporting the family, the help for heating the home;

- b) benefits of social assistance for supporting the child and the family: the state allowance for children, the allowance for raising the child, the insertion incentive, the placement
- c) benefits of social assistance for supporting the persons with special needs: disability allowance, complementary personal budget, HIV/AIDS food allowance, TB food allowance, companion allowance for the visually impaired;
- d) benefits of social assistance for special situations: emergency help, funeral aid.

The criteria on the basis of which social benefits are granted are: the assessment of the income of the single person or of the family, the type of family and the number of members, the living conditions, the owned assets, the state of health and the degree of dependency.

The social assistance benefits are granted for determined periods of time, and the right can be granted, suspended, resumed or terminated by administrative act. The name of social assistance benefits differs depending on the special law that regulates their granting, namely allowances, aids, indemnities, support, incentive, personal budget, supplement.

Through the following secondary data analysis, I make an X-ray of the changes, in the period 2010-2020, of the main social assistance benefits supported from the state budget, respectively of the granting conditions, of the way of determining the amount and payment of the benefits, as well as the rights and obligations of different categories of beneficiaries.

2. Analysis and interpretation

The analysis regarding the evolution of the quantum of social assistance benefits, of the average number of beneficiaries and the sums paid from the state budget has been done based on the data extracted from the annual statistical bulletins published in the period 2012-2020 on the website of the relevant ministry.

2.1. Benefits of social assistance for fighting poverty

The guaranteed minimum income - as a form of support granted to single persons/families with no income or with income below a certain stability limit depending on the number of persons in a family, has not undergone essential changes in terms of the amount granted. In the analysed period, there were only two changes in the amount, respectively with July 2013 and January 2014, the increases being insignificant taking into account that even the annual inflation recorded in all these years was not covered. Although being designed as a tool to eradicate extreme poverty, the guaranteed minimum income does not provide beneficiaries with the financial resources necessary to cover basic needs. For a long period of time, 2014-2020, the amount of the guaranteed minimum income remained unchanged, the amount due to each person in the family being insufficient to ensure the necessities of daily living.

The average number of beneficiaries has recorded a slight increase in 2012, compared to year 2011, the biggest increase being recorded in the years 2014 and 2015, following the increase of the income limit that was taken into account when establishing the right, but also as a result of the entry into force in March 2014 of Law no. 18/2014. Following the adoption of this normative act, when establishing the right to the guaranteed minimum income, the amounts obtained by family members as a result of seasonal activities for which the tax is withheld at source were no longer taken into account. Moreover, these amounts obtained on an occasional basis were one of the main reasons why the right to social assistance was suspended as a result of the non-declaration of income by the beneficiaries. Starting from 2016, the average number of beneficiaries decreased continuously, even below the level of 2011.

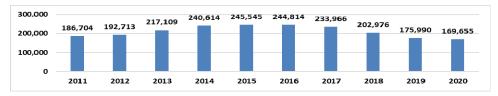


Chart no. 1. The average number of beneficiaries of the minimum guaranteed income in the period 2011-2020

The amounts paid as social aid in the period 2011-2015 followed an increasing trend corresponding to the increase in the average number of beneficiaries. In 2016, the amounts paid reached a maximum as a result of the entry into force of Law no. 342/2015, which established that starting from January 2016, the state allowance for children is no longer taken into account when determining the guaranteed minimum income. This fact led to an increase in the amounts paid to families receiving the minimum guaranteed income. After this period, the allocated funds were smaller and smaller, considering that the number of pending files was in a continuous decrease.

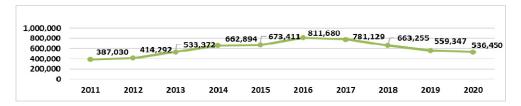


Chart no. 2. Amounts paid as social aid in the period 2011-2020 (thousand lei)

The allowance for supporting the family is one of the social benefits with special destination granted for fighting the poverty of the families with reduced incomes and who have to support children with ages up to 18 years old. This benefit has been thought as a way to ensure incomes for the growth, the care and the education of the minors, with the condition for them to attend a form of education. In fact, it is a way to limit the school dropout of children from families

with modest incomes and at the same time, it stimulates the attendance of school courses by children up to 18 years old. During the analysed period no major modification were done in what concerns the quantum, the only modifications being adopted starting with the rights from the months of July 2013 and November 2014. The increases of the amounts from July 2013 have been insignificant, their increase with over 100% for all the types of families being approved through the Government Emergency Ordinance n. 65/2014 starting with the month of November. The average number of families beneficiaries of allowance for supporting the family has been in a continuous decrease in the period 2011-2014. Only in 2015 has been recorded an increase with almost 30.000 files that were pending for payment in compare to 2014. Later, as a result of the decrease in the birth rate, the trend was of continuous decrease, reaching in 2020 a drop of more than 50% in the average number of beneficiaries compared to 2011.

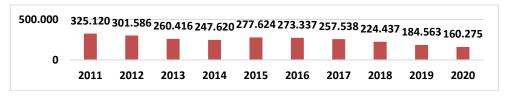


Chart no. 3. Average number of beneficiaries of allowance for supporting the family in the period 2011-2020

Until 2015, the amounts paid as allowance for supporting the family did not register significant increases as the increase in the amount carried out in 2013 was extremely small. As a result of the increase in the amount starting from November 2014, in 2015 the sums insured from the state budget were increased by more than 100%, registering a maximum in the entire period 2011-2020.

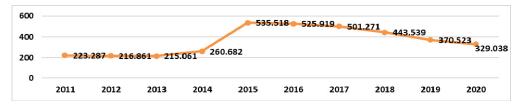


Chart no. 4. Amounts paid as an allowance for family support in the period 2011-2020 (thousands of lei)

Home heating aid as a support measure for low-income families is the benefit that has seen the least and insignificant changes in terms of granting conditions and amounts. The only changes made were those concerning the introduction in 2013 of the aid for heating the home with electricity and the increase starting from 2018 of the maximum limit of average net income from 615 lei to 740 lei. As a result of the increase in salaries in the period 2011-2020, especially the minimum gross salary per country, from 670 lei/month in 2011, to 2,230 lei/month in 2020, the average number of beneficiaries of home heating aid

decreased constantly, reaching only 200,000 beneficiaries in the 2019-2020 cold season, decreasing by approx. 1,000,000 beneficiary families compared to 2011.

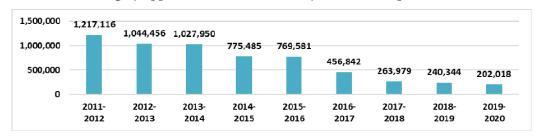


Chart no. 5. Average number of home heating aid beneficiaries in the period 2011 - 2020

Considering the significant and constant decrease in the average number of beneficiaries, the amounts paid as home heating aid decreased 7 times in 2020 compared to 2011.

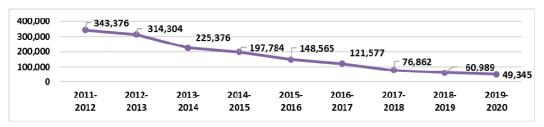


Chart no. 6. Amounts paid as heating aid in the period 2011-2020 (thousands lei)

2.2. Social assistance benefits for supporting the family

The state allowance for children is regulated by the oldest applicable law in the social benefits system, namely Law no. 61/1993. Unlike other European countries, where the state allowance is granted depending on the type of family nucleus, the number of members and the family income or depending on the type of employment contract of the parents, in Romania the allowance is granted to all children, without discrimination. As such, all children up to the age of 18 benefit from the allowance, but also young people over 18 who have not repeated the school year and attend high school or professional education courses without interruption. It is the social benefit with the most quantitative changes made in the period 2009-2021, but also with the highest growth, with these changes annually benefiting over 3,500,000 children.

Compared to 2009, in 2021, the amount of the state allowance has registered an increase of approx. 500%. The successive increases in the amount of the state allowance for children did not lead to an increase in the birth rate, with a continuous decrease in the number of children from 3,869,184 in 2011 to 3,590,874 in 2020.

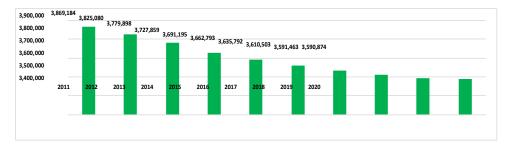


Chart no.7. The average number of beneficiaries of the state allowance in the period 2011-2020

Although the number of beneficiaries has decreased constantly, the amounts paid as state allowance have increased significantly due to the increases made especially in 2019, 2020, 2021, the amounts paid in 2020 being approximately 290% higher than in 2011.

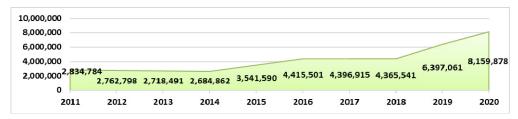


Chart no. 8. Amounts paid as state allowance for children in the period 2011-2020 (thousands lei)

The allowance for child rearing is a social benefit that supplements salary income during the period when one of the parents is on parental leave. The amount of the allowance is calculated as a percentage of the average of the last 12 net monthly incomes achieved before the birth of the child, but the legislator also established a minimum amount paid, respectively a maximum amount. Between 2016 and August 2017, the maximum limit was removed, but later it was reintroduced. The minimum amount increased from 600 lei in 2011 to 1250 lei in 2018, and the maximum from 1200 to 8500 lei.

As a result of the decrease in the birth rate, but also due to the limiting eligibility conditions, in the period 2011-2015 the average number of beneficiaries of parental leave decreased continuously. Starting with 2016, the eligibility conditions have changed, and the average number of beneficiaries has increased constantly as a result of the approval of Law no. 66/2016. Through this normative act, became eligible the persons who in the last 12 months of the last 2 years prior to the date of the child's birth had taxable income. It was an extremely important change brought to the legislation, because until that moment only people who earned income in the last 12 months prior to the date of the child's birth or who were in similar periods, could benefit from child-rearing leave.

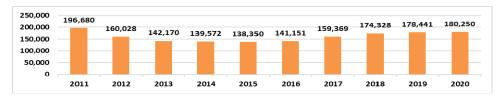


Chart no. 9. The average number of beneficiaries of parental leave in the period 2011-2020

The amounts paid as allowance for raising the child have increased every year as salaries have been increased periodically, and the amount of the allowance results from the application of a percentage of 85% of the average net income achieved in the last 12 months before the birth of the child. Although the number of beneficiaries in 2020 did not exceed that of 2011, the amounts paid in 2020 were more than 3.5 times higher, reaching approximately 5.000.000.000 lei.

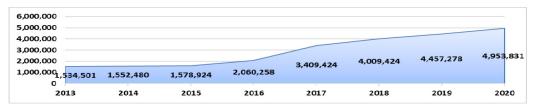


Chart no. 10. Amounts paid as allowance for raising the child in the period 2011-2020 (thousands lei)

The insertion incentive is granted to parents on parental leave who wish to resume their activity before the child reaches the age of 2 years, respectively 3 years for the disabled child. In the period 2011-2021, the amount of the incentive increased from 500 lei to 650 lei, and for parents who resume their activity before the child reaches the age of 6 months, a new amount of 1500 lei was introduced in 2021.

The average number of beneficiaries increased constantly until 2019, the largest increase being recorded in 2017 as a result of the increase in the amount. In 2020, a slight decrease was recorded, but the number of beneficiaries is still high, representing approx. 50% of the number of persons who benefit from parental leave. This fact proves that the introduction of such a benefit and the increase of its amount has led many people to resume their activity before the completion of parental leave.

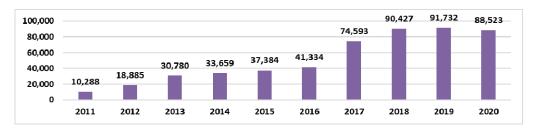


Chart no. 11. The average number of beneficiaries of the insertion incentive in the period 2011-2020

The amounts paid as an insertion incentive have increased in line with the evolution of the number of beneficiaries and as a result of the increase in the amount of this benefit.

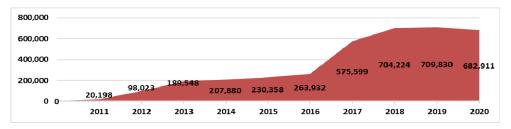


Chart no. 12. Amounts paid as insertion incentive in the period 2011-2020 (thousand lei)

The placement allowance was established by Law no. 272/2004 on the protection and promotion of children's rights. According to it, every child for whom the placement measure was taken, as well as those for whom guardianship was instituted, benefits from a placement allowance. The monthly allowance is paid to the guardian or family representative or the person who took the child in foster care until the child turns 18 and is borne from the state budget. The allowance is also granted after the child reaches the age of 18 if the young person who continues his studies at day school, but without exceeding the age of 26. In the period 2012-2020, the amount of the placement allowance increased only once starting with the month of December 2014. The increase was significant, from 97 lei/month to 600 lei/month, respectively from 146 lei/month to 900 lei/month for the disabled child. The increase had in mind the increase in the quality of life of the children for whom the guardianship or placement measure was instituted.

The average number of placement allowance beneficiaries decreased between 2011 and 2014, but with the increase in the amount carried out in December 2014, the average number increased steadily until 2017. After this year, the number of beneficiaries decreased, reaching year 2020 to 38,042 beneficiaries. Moreover, at the national level, the number of protected children receiving residential services or in families registered a downward evolution.

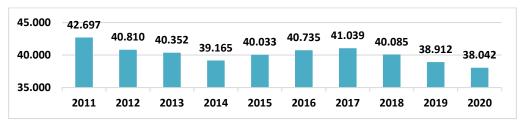


Chart no. 13. Placement allowance - Average number of beneficiaries

The amounts paid as placement allowance increased exponentially in 2015 as a result of the increase in the amounts, subsequently the evolution was decreasing, corresponding to the number of beneficiaries.

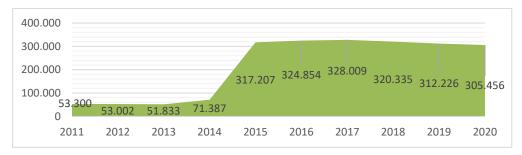


Chart no. 14. Placement allowance – Amounts paid (thousands lei)

2.3. Social assistance benefits to support people with special needs

The disability allowance and the complementary personal budget are two benefits granted based on Law no. 448/2006 regarding the protection and promotion of the rights of persons with disabilities in order to increase the quality of life of the persons with special needs. In the period 2011-2021, the rights of the persons with disabilities registered increases for all types of disabilities, the first increase coming into force in 2015, and the next two in 2018. Unlike the average number of children receiving state benefits which decreased in every year, the number of disabled people who receive benefits according to Law no. 448/2006 has increased constantly, from 1.204.577 in 2011, to 1.539.710 in 2020.

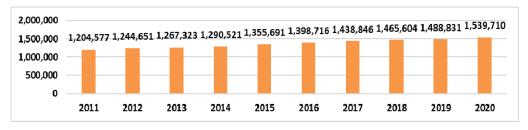


Chart no. 15. Rights of disabled people - Average number of beneficiaries

The amounts paid as disability allowance and complementary personal budget have increased every year as a result of the increase in the number of people classified as disabled. In 2018, there was a significant increase in the amounts allocated as a result of the two successive increases in January and July 2018. Compared to 2011, the amounts allocated in 2020 increased by approximately 115%, reaching 4,373,421,000 lei.

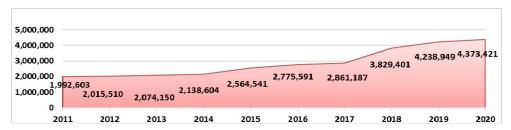


Chart no. 16. Rights of disabled people - Amounts paid (thousands lei)

Food allowance for people infected with HIV or sick with AIDS - In 2002, Law no. 584/October 29, 2002 was approved on measures to prevent the spread of the AIDS disease in Romania and to protect people infected with HIV or sick with AIDS, law that regulate the directions of action for the prevention, surveillance and control of HIV infection and AIDS. According to this law, for the first time a monthly food allowance was established for people infected with HIV or suffering from AIDS

In 11 years, the amount of the food allowance for people infected with HIV or sick with AIDS has been changed only twice, the increases being insignificant considering the repeated price increases of basic foods and the annual inflation. During this period, the daily food allowance increased for adults from 13 lei to 17.6 lei and for children from 11 lei to 16.5 lei.

In the period 2011 – 2020 the average number of beneficiaries increased in 2011 in compare to 2010 with approx. 50%, reaching to 11.382 adults and children.

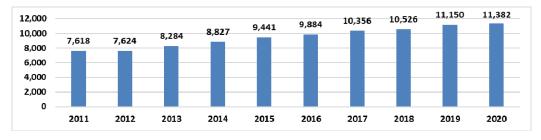


Chart no. 17. Food allowance – Average number of beneficiaries

The amounts paid as food allowance for the persons infected with HIV or sick with AIDS has increased annually, as a result of increases in the amount, but also of the increase in the average number of beneficiaries reaching 67.320.000 lei in 2020.

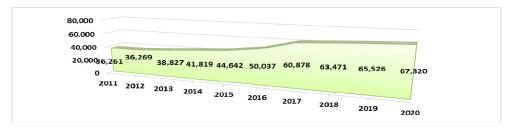


Chart no. 18. Food allowance - Amounts paid (thousands lei)

In the period 2011-2020, the social assistance benefits for supporting the family had the largest share of the total amounts allocated in the social assistance budget, representing over 63% of the total expenses. This category is followed in order of the importance of the amounts allocated by the one regarding social assistance benefits to support people with special needs, having a percentage of over 25%. Surprisingly, social assistance benefits for combating poverty, although they are granted for the purpose of combating extreme poverty and social exclusion, had a percentage of only 11% of the total amounts allocated during the reference period.

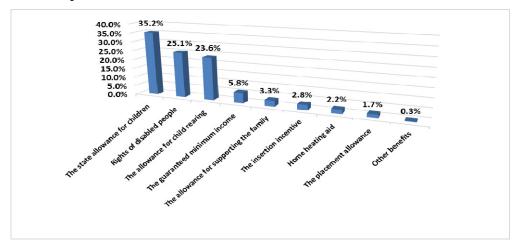


Chart no. 19. The percentage distribution of the amounts paid for social programs financed from the social assistance budget in the period 2011-2020

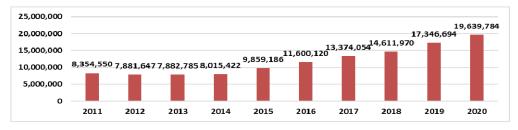


Chart no. 20. Amounts paid as social benefits in the period 2011-2020 (thousands lei)

Analyzing the amounts paid as social benefits, we can see that they have registered a significant increase starting with year 2015, reaching in 2020 the figure of 19.639.784.000 lei, which is double of the financial allocations from 2011.

3. Conclusions and proposals

Our conclusions regard the necessity of granting some social benefits, respectively the efficiency of the allocation of funds for this purpose. In terms of social assistance benefits for preventing and combating poverty and the risk of social exclusion, they underwent a series of legislative changes aimed at improving the access of beneficiaries by gradually eliminating their obligations and some categories of income that once obtained led to termination of the right. Contrary to the intention to increase the access of disadvantaged categories to these benefits and to reduce extreme poverty among the population, the number of beneficiary families has constantly decreased, and the failure to update the amounts at least with the inflation rate has led to a continuous decrease in the standard of living. It is worth noting that for a period of more than 8 years, the amount of the guaranteed minimum income, the family support allowance and the home heating aid, being reported to the Social Reference Indicator (ISR), have remained unchanged. The social reference indicator was introduced with the aim of representing a benchmark for establishing social benefits and can be updated by government decision. However, the political decision-makers did not index this indicator either with the inflation rate, nor in relation to the evolution of the minimum wage, nor in relation to the evolution of prices. For this reason, for families with children who do not have an income of a salary nature, the main financial source today is the income from carrying out occasional activities, the state allowance and the disability allowance. One of the reasons for this phenomenon is the repeated extension of the deadlines for the application of Law no. 196/2016 on the minimum income for inclusion, which, once entered into force, would have determined a significant reduction in the number of poor persons and families in Romania.

The social assistance benefits for supporting the child and the family, unlike those regarding the fight against poverty, were modified in the sense of increasing the amount and relaxing the granting conditions in order to increase the number of beneficiaries. At the same time, to boost domestic adoptions and support adoptive families, new social benefits were granted. The increases in these amounts have brought important benefits to families with minor children, they have led parents to opt for child-rearing leave or to resume their salaried activity and obtain the insertion incentive, they have led to an increase in the quality of life of minors taken in foster care, as well as to financial support of adoptive families. Despite the legislative changes aimed at supporting the family, the total number of beneficiaries has gradually decreased, the reason being the annual decrease in the national birth rate and the phenomenon of migration of young families to the developed countries of the European Union.

The legislation regulating social assistance benefits for supporting people with special needs was completed with new normative acts aimed at increasing the

quality of life of beneficiaries by increasing the number of benefits, but also granting financial support to other categories of people. The number of persons with special needs has increased constantly as a result of the aging of the population, and the amounts allocated in the social assistance budget have kept the upward trend, representing over 25% of the total amounts paid as social benefits.

At the end of 2020, the total number of beneficiaries decreased as compared to the previous years, but the financial allocations for the payment of social benefits exceeded 19 billion lei, which means that the amounts allocated have doubled in compare to the social assistance budget of 2011.

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Abreviations:

- MMFPS Ministry of Labor, Family and Social Protection
- MMFPSPV Ministry of Labor, Family, Social Protection and Elderly
- MM7S Ministry of Labor and Social Justice
- MMPS Ministry of Labor and Social Protection
- MMSSF Ministry of Labor, Social Solidarity and Family