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# CONTINUOUS TRAINING OF TEACHERS IN ROMANIA COMPARATIVE ANALYSIS BEFORE AND AFTER THE PANDEMIC

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**Abstract:** *Having well-trained and motivated teachers are the prerequisites for quality education, wherein students can reach their full potential. The pandemic context that led to the transition from the face-to-face education to the online one further emphasized the vital role of teachers in providing all students with equal and quality learning opportunities. The health crisis has highlighted the weaknesses of the education systems, but also the strengths that have allowed them to adapt to the newly created context of online or hybrid education. The pandemic context once again underlined the need for the continuous training of teachers. Starting from this premise we aimed to identify the situation of continuous training of teachers in Romania before the crisis and two years after the pandemic, in the current context of COVID-19 endemic. We proposed a comparative analysis of the topics of the training programs before and after the pandemic, using the data provided by the relevant ministry. Our research is based on public data provided by the Directorate for Continuing Education of the Ministry of Education in Romania, responsible for the accreditation and evaluation of continuing education programs for pre-university teachers. The study aims to identify the evolution of continuing education having as a starting point the latest Register for continuing education programs at the time the pandemic started (March 15, 2020) and the register for continuing education programs accredited two years after the health crisis began (15.01.2022).*

**Keywords:** continuing education; training programs; thematic areas; professional development; pandemic context

## **1. Continuing education in Romania. General context**

In Romania, the Ministry of Education is the institution that sets the objectives and coordinates the continuous training of the teachers at the level of pre-university education system, in accordance with the national strategies and policies.

A high-quality training of the teachers, based on an integrated system for initial formation, internship and continuous professional development is needed now more than ever to answer the current demands of the teachers and the growing pace of change, as well as the new requirements that they will greet during professional life. A strong initial foundation is essential for equipping new teachers with knowledge, skills, abilities, attitudes, awareness and confidence needed to teach, to be pro-active and to manage change with professionalism in a rapidly evolving environment (Șerbănescu, 2011).

The activity of continuous training is supported by the providers of training programs, which can be educational institutions/ units, non-governmental organizations or legal entities, public or private, whose main object of activity is the continuous training and professional development of the teachers and auxiliary school personnel, as well as the management, guidance and control staff in pre-university education, according to Ministerial Order 5564/2011, art. 2, paragraph (1). All these continuing education providers are organized in the National Register of Accredited

Providers of Continuing Education, where we can find their offer of accredited training programs.

The continuing training program represents the educational offer of a provider, which aims at training and developing the professional competencies of the teachers and auxiliary school personnel, as well as of the management, guidance and control staff in pre-university education, in accordance with the professional standards for the teaching profession quality standards and professional competencies according to Ministerial Order 5564/2011, art. 2, paragraph (2). The participation of teachers in continuing education programs is often a personal choice and is mainly based on the need to accumulate continuing education credits (necessary for their career development and job security) and less on the need to consciously improve the teaching - learning - assessment process. Continuous training programs are, in many cases, unrelated to various systemic priorities or school development goals, and their costs are often covered by the participating teachers (Bădescu et al.).

In Romania, the continuous training of teachers is a right, but at the same time an obligation established by the Law of National Education (Law 1/2011, art. 245). The secondary education staff have the obligation to periodically participate in continuous training programs, so as to accumulate, during consecutive intervals of 5 years, starting from the date of passing which is called the *Definitivat* exam in education, at least 90 transferable professional credits (Law 1/ 2011, art. 245).

The legal obligation to develop and continuously train teachers is not supported by incentives (in case of compliance) and/ or with sanctions (in case of non-compliance). Also, since 2011 when the Law of Education, which regulates the continuous training of pre-university education staff, was drafted, and implemented but no procedures have been developed so far for the implementation of these legal provisions (2022). There are no public reports on centralized data on the teachers who have obtained the 90 credits within the time limit set by the law, just as there are no centralized data on the accredited continuing education programs and the number of participants in such programs.

In Romania, according to art. 4 of the Methodology regarding the continuous training of teachers in pre-university education, continuous training is achieved through programs and activities of developing the scientific, psycho-pedagogical and didactic training of teachers; training programs in the fields of education management, guidance and assessment; training courses to prepare and take the exams for the 1st and 2nd teaching degrees; professional conversion programs; studies corresponding to a specialization in some other field of license. The continuous training of teachers in the Romanian education system, according to the normative acts in force, ensures the updating and development of teachers' skills, the acquisition of new competencies, depending on the evolutions in terms of education needs and the educational curriculum, as well as the requirements on adapting the competencies of the teaching staff to the changes in the structures/ processes of education.

Regarding the impact of the training activities carried out by the teachers on the teaching-learning-evaluation processes in a class of students, we do not find information on this aspect.

TALIS 2018 data reveals that a high proportion of teachers participate in continuous professional development (CPD) activities 92.5 % of lower secondary teachers in EU countries have attended at least one type of professional development

activity in the 12 months prior to the survey. Three countries stand out with lower than EU level (although still relatively high) participation rates. In France, Portugal and Romania, the proportion of teachers who have participated in CPD are 82.6 %, 88.0 % and 89.0 % respectively (Eurydice, 2021):

**Table 1: Share of teachers who participated in continuous professional development (CPD)**

Source: Eurydice, on the basis of TALIS 2018 (see Table 3.1 in Annex II).

	FR	BE fr	PT	MT	DK	IT	ES	NO	SK	FI	CY	EU	BE nl	CZ
%	82.6	90.8	88.0	91.3	92.4	93.2	91.8	93.8	92.2	92.7	92.2	92.5	97.1	97.3
Average	2.4	2.5	2.9	3.1	3.2	3.3	3.3	3.4	3.4	3.4	3.4	3.5	3.6	3.8
	AT	SE	BG	HU	UK-ENG	RO	NL	TR	IS	HR	SI	EE	LV	LT
%	98.7	95.4	95.9	94.5	96.5	89.0	98.2	93.6	95.5	98.1	98.3	97.7	98.6	99.4
Average	3.9	3.9	3.9	4.0	4.0	4.2	4.3	4.3	4.6	4.7	4.7	5.0	5.2	6.1

The pandemic context also produced changes in the field of continuous training of teachers in the Romanian education system.

The first action taken by the Ministry of Education on March 13, 2020 was to suspend the training activities that were in progress under accredited continuing education programs, for pre-university teaching staff. Between March 15, 2020 and December 2021, the relevant ministry elaborated 8 normative acts - 8 ministerial orders and 2 addresses for the regulation of the activity of continuous training of the teaching staff in pre-university education (<https://edu.ro/formare-continua>):

Order no. 5.138/ 27.08.2021 regarding the accreditation, organization and development of continuous training programs, intended for the teaching staff in pre-university education, in the school year 2021 - 2022.

Order no. 5.967/ 6.11.2020 for the approval of the Methodology regarding the system of accumulation, recognition and equivalence of transferable professional credits.

Address no. 7.371/ DGIP/ 03.11.2020: Clarifications regarding the application of order no. 5.767/ 15.10.2020 regarding the accreditation, organization and development of continuous training programs, intended for teachers in pre-university education, in the school year 2020-2021.

Order no. 5.767/ 15.10.2020 regarding the accreditation, organization and development of continuous training programs, intended for teachers in pre-university education, in the school year 2020-2021.

Order no. 4.862/ 08.07.2020 on establishing support measures for teachers in pre-university education, supported through continuing education activities, organized and carried out through the Teachers' Resource Centers (TRCs), in order to ensure the quality of the teaching-learning-assessment process, including the *blended learning and online* system, in the context of the COVID-19 pandemic.

Order no. 4.649/ 30.06.2020 on the establishment of certain measures regarding the accreditation, organization and development of continuing education programs for teachers in pre-university education, in the context of the COVID-19 pandemic + annex.

Order no. 4.303/ 21.05.2020 for the modification and completion of the Methodology regarding the continuous training of the pre-university education staff,

approved by the order of the Minister of Education, Research, Youth and Sports no. 5.561/2011.

Order no. 4.253/ 13.05.2020 for the amendment of the annex to the order of the Minister of Education and Research no. 3.241/ 2020 regarding the approval of the Calendar of activities provided in the Methodology regarding the equivalence on the basis of ECTS/ SECT of short-term university education, carried out by the 3-year college or the 3-year pedagogical institute, with cycle I of undergraduate studies, for teachers in pre-university education, approved by order of the Minister of Education, Research, Youth and Sports no. 5.553/2011, 2019 - 2020 session.

Order of the Minister of Education and Research no. 4.246/ 13.05.2020 regarding the modification and completion of the order of the Minister of Education and Research no. 3.844/ 27.03.2020 on the establishment of measures towards the development of accredited continuing education programs, intended for teachers in pre-university education, in the context of the COVID-19 pandemic.

Order of the Minister of Education and Research no. 3.844/ 27.03.2020 on the establishment of measures on the development of accredited continuing education programs, intended for teachers in pre-university education, in the context of the COVID-19 pandemic.

The suspension of the training activities within the accredited continuous training programs, intended for the teaching staff from the pre-university education, which are being implemented (publication date: 13.03.2020). The legislative measures on the organization and development of continuing education programs during the pandemic have ranged from their suspension for a short period of time to their online reorganization. At this moment, the accreditation of continuous training programs is only done as online or blended learning.

In Romania, demographic factors combined with teachers' high participation in professional development activities mean that strengthening professional development will be essential to raising teaching quality. First, because the general decline in teacher numbers (reflecting the declining student population overall) means that reforms to initial teacher education will impact only a minority of the profession over the coming decade. This means that updating and modernising teachers' knowledge and skills will primarily be achieved by working with the existing teacher population. Second, data indicates that in-service teachers in Romania participate in professional development more than their counterparts in many other European and OECD countries. While the content and delivery of professional development are not currently perceived to be effective or closely target teachers' needs, this does signal a positive expectation that teachers engage in professional development and have the time to do so (OCDE).

## **2. Methods**

The problem addressed in this study is the training status of secondary teachers in Romania before the health crisis started and after two years of pandemic, in the current context, when the restrictions have diminished and the face-to-face activities have resumed. We aimed to identify the evolution of continuous training programs from the perspective of the number, the distribution by counties, the topics addressed, the institutions providing training programs. Our research is based on public data provided by the Directorate for Continuing Education of the Romanian

Ministry of Education, responsible for the accreditation and evaluation of continuing education programs for pre-university teachers. The study aims to identify the evolution of continuing education having as a starting point the latest Register of continuing education programs, at the time the pandemic started (March 15, 2020) and the register of continuing education programs accredited two years after the beginning of the health crisis (January, 15, 2022). The number of training programs during the period under analysis showed a very slight upward trend. From the beginning of the pandemic to the return to face-to-face activities, by analyzing the two registers, we identified an increase of 89 continuing education programs (Table 2).

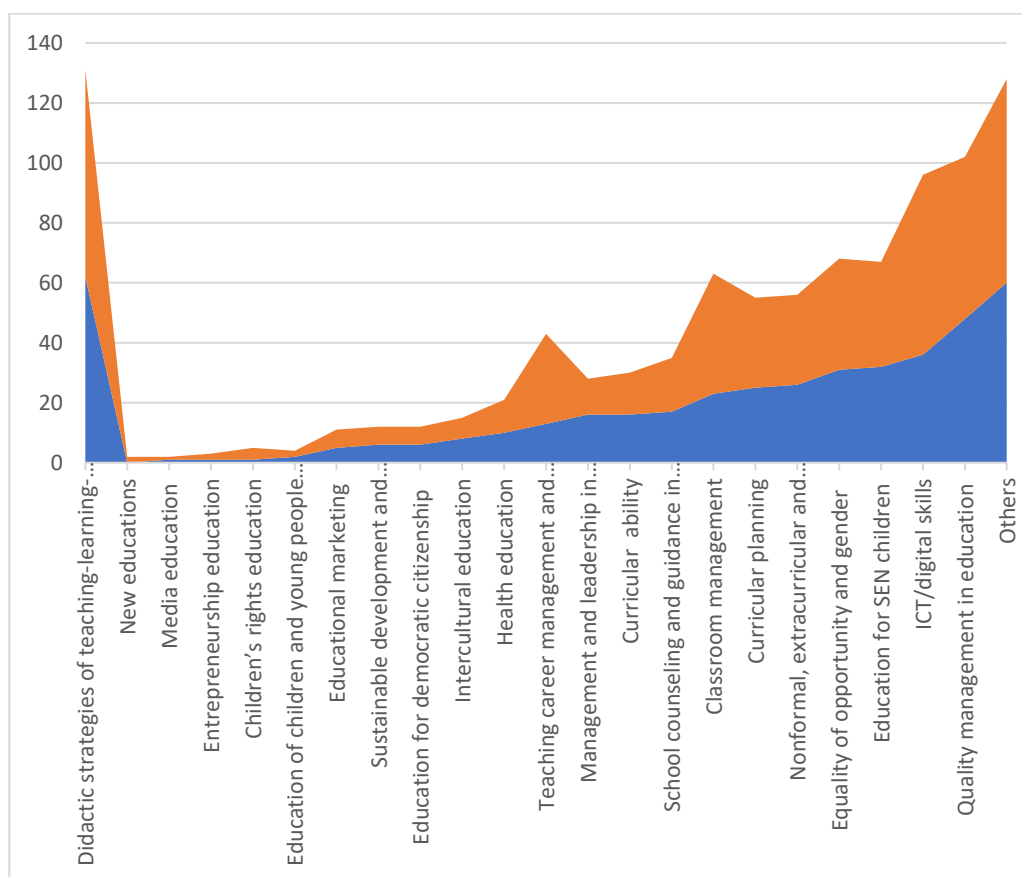
The weak/ inconsistent offer of training courses dedicated to the training of e-learning or blended learning skills has led to looking for alternative solutions. Many teachers have been put in the position to conduct online teaching activities without professional support, looking for ad-hoc solutions. Another research done during the pandemic (Botnariuc et al, 2020: 25) emphasized the fact that formation and courses did not represent the most important support for online didactic activities, but the guidance offered by more experienced colleagues, good practice shared by them and tutorials found on the Internet. The poor supply/the inconsistency of training courses committed to e-learning competences formation or blended learning led to the search of alternative solutions. Many professors found themselves in the position to do online didactic activities without professional support, searching ad-hoc solutions.

**Table 2: Number of continuous training programs.  
Comparative analysis 2020-2022**

15th March 2020		15 <sup>th</sup> January 2022	
Didactic strategies of teaching-learning-evaluation	62	Didactic strategies of teaching-learning-evaluation	69
Curricular ability	25	Curricular ability	30
Equality of opportunity and gender	31	Equality of opportunity and gender	37
Management and leadership in education	48	Management and leadership in education	54
Classroom management	23	Classroom management	40
Quality management in education	16	Quality management in education	12
ICT/digital skills	36	ICT/digital skills	60
Curricular planning	16	Curricular planning	14
Nonformal, extracurricular and informal education	26	Nonformal, extracurricular and informal education	30
Health education	10	Health education	11
Teaching career management and counseling	13	Teaching career management and counseling	30
School counseling and guidance in career	17	School counseling and guidance in career	18
Education for SEN children	32	Education for SEN children	35
Education for democratic citizenship	6	Education for democratic citizenship	6
Educational marketing	5	Educational marketing	6

Intercultural education	8	Intercultural education	7
Sustainable development and globalization challenges	6	Sustainable development and globalization challenges	6
Education of children and young people with exceptional abilities	2	Education of children and young people with exceptional abilities	2
Children's rights education	1	Children's rights education	4
Media education	1	Media education	1
Entrepreneurship education	1	Entrepreneurship education	2
Others	60	Others	68
<b>Total</b>	<b>455</b>	New educations	2
	<b>Total</b>		<b>544</b>

**Figure 1: The evolution of training programs 2020-2022**

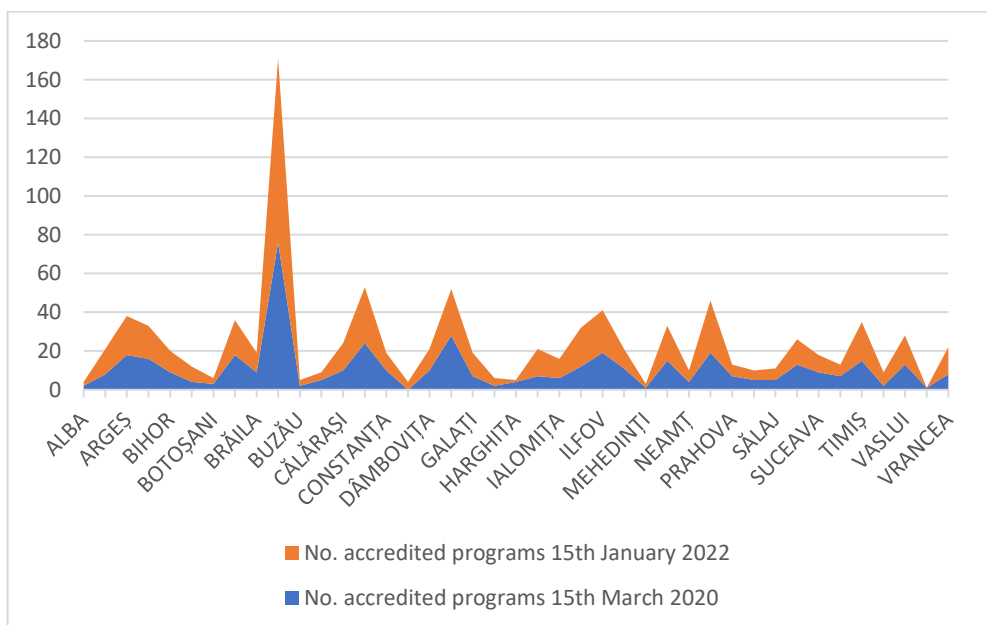


The highest increase was registered in the case of the training programs for the development of ICT/ digital skills. If on March 15th 2020 we find in the Register of accredited continuing education programs 36 programs in the ICT/ digital skills thematic area, in the Register of January 15th 2022, the number of programs from this thematic area it almost doubled, reaching 64. A significant increase was also registered in the number of programs in the thematic area Classroom Management (23 in 2020/

40 in 2022). The thematic area Teaching career management and counseling is on the same upward trend (Figure 1).

Regarding the evolution of the number of programs at the level of each county, we did not identify any county that would register very high increases; the difference of 89 programs is distributed over the 40 counties and Bucharest. The highest increase is registered in the capital, 19 programs, Iași and Olt 8 programs, Hunedoara 7 programs, Vrancea 6, Iași and Cluj 5 programs each. The rest of the counties have an increase of 1, 2 or 3 programs, but there are also counties where the number of accredited programs has remained the same or has been decreasing.

**Figure 2: Number of accredited training programs 2020-2022**



A representative study conducted at the end of the 2020-2021 school year aimed to identify the level of participation of pre-university teachers in vocational training through an online platform during the beginning period of the pandemic (March-June 2020). Significantly, the responses of the teachers participating in the research highlighted the fact that training and courses were not the most important support for online teaching activities, but the counseling provided by more experienced colleagues, the good practices shared by them, the tutorials found on the Internet, because, at that time, the training activities were suspended, and when they were resumed, it was necessary to reorganize them for online conduct. Prior to the pandemic, all accredited continuing education programs were only face-to-face, with physical presence.

### 3. Conclusions and discussions

The professional development of teachers is an important component in ensuring a quality education.

Continuing professional development is strongly encouraged in European countries. In most education systems, continuing professional development is considered a professional duty, and teachers are often required to complete a minimum number of hours per year. In Romania, as we mentioned at the beginning, professional development is a right and an obligation, stipulated by the Education Law. Unfortunately, there are no studies to confirm the stage of continuous training of all the teachers in the Romanian pre-university education.

Countries have developed various incentives and support measures to encourage participation, such as free courses, the opportunity to participate during the working hours, salary increases and promotion. Schools tend to be involved, to varying degrees, in defining the needs and priorities of continuing professional development, which can help continuing professional development providers to better meet the specific requirements of teachers. In Romania, except for training courses offered under European-funded programs, continuing education activities are financially supported by each teacher, which means that the option for a training program is often influenced by its cost. Also, in Romania, the continuous training programs take place outside the working hours.

The Eurydice report, *The Teaching Profession in Europe* (European Commission/ EACEA/ Eurydice, 2015) identified that the time that secondary school teachers spend on continuing professional development is longer in countries where it is mandatory. The study also points out that the mismatch between continuing education provision and teacher needs is generally lower in countries where schools and teachers themselves are responsible for setting training priorities.

In general, continuing professional development in Europe can be considered mandatory (i.e. there is a minimum of continuing professional development that all teachers must complete). In Romania, continuous professional development can be considered as having a compulsory status, because each teacher must accumulate 90 transferable professional credits within 5 years. But, as we mentioned at the beginning of the study, in Romania there are no mechanisms for implementing this provision. In Romania there is no continuous professional development plan at school level, each teacher makes his own choices, depending on costs and personal time management or personal projects (obtaining a score for professional mobility, obtaining a material reward through merit gratification). We consider important the elaboration of the continuous development plan at the level of each school and from the perspective of the organizational development of the school.

The continuous development of teachers is a very important component both for career development and for ensuring quality education. The experience of the last years supports our proposal to identify the real needs of continuous training of teachers, as well as to build a plan of continuous development at the level of each school. Another problem for which Romania needs to identify solutions is the provision of funds in the budget of each school, which teachers can access in order to financially support their continuing education activities.

We also consider it important that the activity of continuous teacher training counts in the career development of teachers and in providing financial incentives, as well as for taking over certain responsibilities at the level of the school organization.

The methodology of continuous training in Romania was approved by an order of the Minister of Education in 2011, which was amended over time by many other



regulations. We consider it necessary to develop a new normative act to respond to the new changes in education in general and teachers in particular face.

If we succeed in creating a system of continuous teacher training that meets their expectations, we will be able to keep teachers in the system, concerned with becoming better.

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# THE EFFECTS OF OCCUPATIONAL STRESS ON THE EMPLOYEES OF A CALL CENTER IN THE BANKING FIELD IN TIMIȘOARA

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**Abstract:** *Occupational stress has become a challenge for many organizations that want on the one hand to keep their employees and on the other hand to ensure their performance through a pleasant organizational climate. The present paper investigated and evaluated the perception of 14 male employees (French and Romanian speakers) of a call center in the banking field in Timișoara on the causes and effects of occupational stress. The applicability of this research consists in the development of possible strategies and practices for control and reduction of occupational stress to reduce the high rate of staff turnover. The elaboration of this study is based on the concepts of occupational stress, professional mobility, but also the learning of a foreign language at work, because call center agents chosen for the present research operate in French, which is a language other than their native one. To carry out this qualitative research, we used a semi-structured interview guide elaborated both in Romanian and French – half of the interviews' participants are Romanians and half are North-Africans from Tunisia, Morocco, and Algeria. The main topics on which the interview guide questions were developed are the following: personal and professional experience, way of working, working schedule, work rate, and professional mobility.*

**Key words:** *Occupational stress; Professional mobility; Call center; Banking field; Multiculturalism.*

## 1. Introduction

Over the years, sociologists have suggested that the first and most important sociological structure in human life is the family. This generates both social support and stress. In recent decades, the work environment, and the job itself have risen to second place (Seaward, 2018: 39). Thus, occupational stress has become a challenge for many organizations that want on the one hand to keep their employees and on the other hand to ensure their performance at high levels through a pleasant organizational climate. The effects of the occupational stress include job change, burnout, low motivation and satisfaction, poor performance, or even inefficient interpersonal relationships in the workplace (Manshor, Rodrigue and Chong, 2003: 622). Among the jobs with the highest staff turnover rates due to burnout is the call center (Seco and Lopes, 2013: 679). People employed as call center operators, regardless of their working field, have direct telephone contact with different types of customers. High expectations of employers, the inability to cope with long-term work pressure, frustration in the process of interacting with the client, but also the high workload lead to individual emotional exhaustion, loss of enthusiasm and behavior characterized by indifference, dissatisfaction with the workplace (Cameron, Bright and Caza, 2004: 1). In this research, we will focus on the effects of occupational stress on employees of a banking call center. Bank call center employees take care of customers on a daily basis, and the way they express themselves, how efficiently and error-free they process transactions and requests, strongly influences the public perception of the financial services provided. These are the ingredients of an excellent banking service (Moorad, 2018: 52). After determining the causes, but also the effects of occupational stress, we will try

to offer possible solutions for effective stress management that can be implemented by both management and employees, in order to reduce the high rate of staff turnover.

## **2. Literature review**

The concept of occupational stress has been defined both broadly and to a lesser extent, being treated as a stimulus, a response, an environmental characteristic, an individual attribute, or an interaction between an individual and his work environment (Katz and Kahn, 1978). Occupational stress can also be defined by the individual's reactions to the characteristics of the work environment that may seem emotionally and / or physically threatening (Jamal, 2005: 224). While some sociologists would label a physiological dysfunction as stress (Ivancevich and Matteson, 1980: 5), others would rather consider it a consequence of stress (Schuler, 1980: 184). Therefore, Ivancevich and Matteson categorized stress as "the most inaccurate (term) in the scientific dictionary" (1980: 5). We can also use the term occupational stress to describe the feeling of a person being asked to deviate from the normal pace of work as a result of constraints or demands of management. The use of the term "feeling" is not random, because occupational stress involves "a subjective awareness of our own emotional state" (Gaylin, 1979: 1). In addition, this feeling is both uncomfortable and unwanted by the individual. This conceptualization of occupational stress as uncomfortable and undesirable helps to distinguish it from positive motivational feelings that result, for example, from accepting to overcome a difficult but achievable obstacle. Therefore, the concept of stress may be limited to an emotional response to stimuli that may have dysfunctional physiological and psychological consequences. We will delimit in the following the dimensions in which it can be found, and we will try to present and exemplify the different types of stressors that can occur at work.

According to Matthews G. (2001), stress can come from four basic sources: the environment (weather, noise, congestion, pollution, unsafe environment), social stressors, the requirements of one's social role - financial problems, misunderstandings with loved ones, divorce), physiological factors (menopause, aging, childbirth, sleep disorders, poor nutrition) and psychological (our body may perceive situations as stressful, difficult, unpleasant, although in reality, our thoughts are what determine this thing). Positive stress has the following characteristics: it motivates the employee, helps channel his energy to meet the demands and demands of the employer, improves performance, and is felt as a coping strategy. Examples of positive stressors: receiving a job promotion, starting a new job, retiring, participating in a new training, learning new things (Ornelas and Kleiner, 2003: 64). On the other hand, negative stress causes anxiety, it is long-lasting, decreases the employee's performance and motivation, can lead to physical and mental problems and as a result the individual must resort to coping strategies. Examples of negative stressors: interpersonal conflicts, presenting projects to colleagues, lack of necessary skills in the workplace, conflicts with colleagues, clients or superiors, excessive workload, inflexible work schedule (Ornelas and Kleiner, 2003: 64)

To date, studies have shown that stress at work contributes to the emergence of health problems among employees, but also to organizational problems such as low productivity, unmotivated absenteeism, high turnover rate of company staff, employee dissatisfaction and indifference to the needs of the organization (Beehr and Newman, 1978: 665). Identifying the reasons why employees choose to change their current jobs is very important for improving the retention rate of employees. The rate of staff mobility is a very debatable topic in both the public and private sectors. This importance is due to the high costs, especially from a financial point of view, as it can lead to an increase in the expenses allocated for the recruitment and, implicitly, the training of employees (Balfour and Neff, 1993). The low retention rate of employees is a significant problem faced by call center managers (Seco and Lopes, 2013), with call centers recording some of the highest rates of staff turnover (Kamala, 2013). In order to reduce its values, the managers of these call center organizations need to find employees who fit the

existing corporate culture within the company and who are likely to remain (Ejaz, 2015). According to Seco and Lopes (2013), reducing staff turnover is a real challenge for call center managers, as they need to focus on providing rewards, salary increases, improved working conditions, promoted employee loyalty and increased employee satisfaction.

### **3. Research methodology**

While conducting a research, one can use qualitative, quantitative, or mixed methods. After studying these three methods, we chose to carry out the research work using a qualitative method. Qualitative researchers often use structured, semi-structured or unstructured interviews, focus groups, or participant observation as methods of data collection (Uluyol and Akçi, 2014). We use qualitative research methods because we want to find out the perceptions, beliefs, attitudes, opinions, and meanings that the actors subject to the investigative approach have formulated in the context of the stated objectives of the research (Vasiluță-Ștefănescu, 2015: 136). Through this study, we want to explore the perception of the employees of a banking call center in Timișoara on the causes and effects of occupational stress, as their working language in French. After determining the causes and effects of occupational stress, we will suggest some strategies and practices to control and reduce it, in order to decrease the high rate of staff turnover, the latter idea being the main objective of this research. Therefore, the qualitative method was the most appropriate for this study, because to determine the causes and effects of stress on an individual level we need the participants to tell us both positive and negative events they faced at work, to describe who they are. their perceptions of the concepts presented and provide us with arguments and counterarguments for the ideas they evoke.

The main objective of this research is to identify the perception of the employees of a call center in the banking field in Timișoara on the causes and effects of occupational stress. The applicability consists in the development of possible strategies and practices for control and reduction of occupational stress in a call center on the banking field in Timișoara in order to reduce the high rate of staff turnover. In addition to the main objective of the research, we have developed other specific objectives that contribute to achieving the main objective:

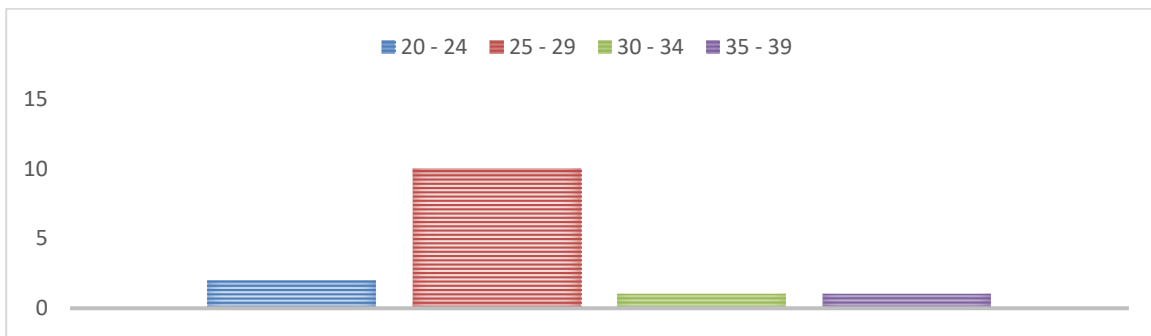
- Identifying the factors that contribute to the occurrence of occupational stress among employees of a call center in the banking field in Timișoara;
- Assessing the possible differences in the perception of occupational stress depending on the nationality of the employees of a call center on the banking field in Timișoara (between Romanian employees and North African employees);
- Identifying the coping strategies and practices in stressful situations used by the employees of a call center on the banking field in Timișoara;
- Identifying the perception of the employees of a call center on the banking field in Timișoara on the way in which the stress related to the workplace can affect their social life.

The general question of the research is the following: Is there a link between the negative perception of occupational stress and the option for professional mobility of staff in a banking call center in Timisoara? Possible answers also have a practical reflection which can be materialized in the documentation of strategies to control and reduce occupational stress that could decrease the high rate of staff turnover in a banking center in Timisoara.

Given the qualitative specifics of this research, we cannot speak *stricto sensu* of sampling, but rather the selection of the necessary units from the universe of the population studied, referring to previous research undertaken on this topic (Vasiluță-Ștefănescu, 2015: 136). Thus, the universe of the population is represented by all the call centers in Romania that carry out their activity in a foreign language. Therefore, we chose 14 male employees of the same company based in Timisoara. The project within which they operate is a call center in the banking field, the calls being handled in French. Employees who participated in the interviews ranged in age from 22 to 37 years. Most employees are between 25 and 29 years old, two

employees are between 20 and 24 years old and we identified only one individual in the categories 30-34 years old, respectively 35-29 years old (Figure 1. Age distribution of employees).

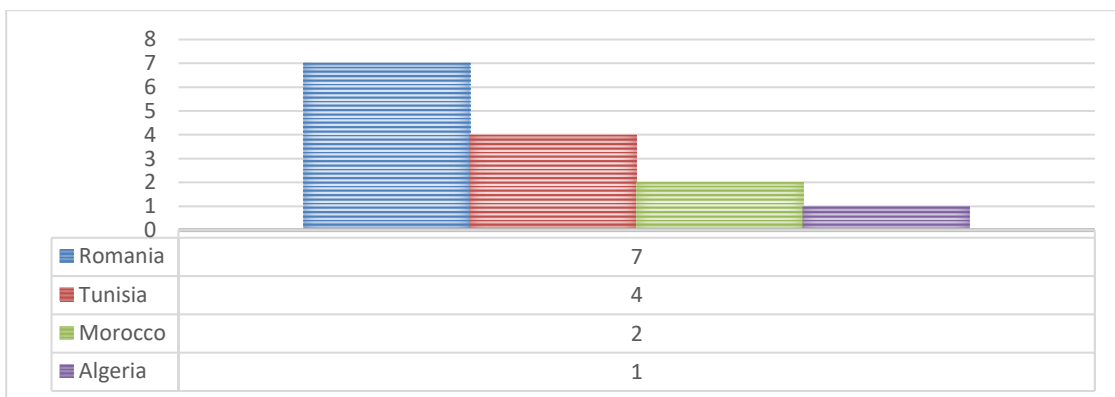
**Figure 1. Age distribution of employees**



Regarding the educational level, 4 of the employees graduated from university, while 10 also have a master’s degree. The fields in which they completed their studies are diverse: law, pharmacy, letters, management, economics, agronomy, either in Romania or abroad.

Half of the individuals subjected to the research are of Romanian nationality, and the other half come from North Africa: Tunisia, Algeria or Morocco (Figure 2. Country of origin).

**Figure 2. Country of origin**



As for the native language, it is either Romanian for employees whose country of origin is Romania, or Arabic for North African employees - a single employee of Romanian nationality also perceives French as a native language, because he grew up in France. Their seniority in the company varies between 1 month (employees who are still on probationary period, lasting 3 months) and 3 years. Six of the interviewed employees have been working in this call center for less than a year, and eight of them have been in the same job for more than a year. Employment contracts are either part-time, on a 4-hour schedule, or full-time. The two employees who currently work part-time are of North African nationality and have already submitted the documents for the modification to a full-time contract.

To carry out this qualitative research we used the interview technique, and the tool used is the semi-structured interview guide, which “involves collecting oral information, with the possibility of obtaining specific answers to questions and observing nonverbal behaviors and standardizing answer conditions” (Vasiluță-Ștefănescu, 2015: 137). We conducted 14 semi-structured interviews with employees of the same call center on the banking field in Timișoara. Given that 5 of the participants do not speak Romanian fluently, being of North African nationality, we translated the interview guide into French to facilitate communication - therefore, out of a total of 14 interviews, 9 were taken in Romanian and 5 in French. The interviews were conducted through telephone calls in the first half of 2021, with an average duration of 46 minutes (the shortest interview lasted 32 minutes, and the longest conversation lasted up to 78 minutes). In advance, each participant confirmed by e-mail their agreement on the recording of the interview and its use for academic purposes, being assured of the anonymity and confidentiality of the answers provided. Following the recording of the interviews, we transcribed the 14 interviews directly into Romanian. Considering that I [Alina Staicu] graduated from Modern Applied Languages Faculty, French-English, I can state that for the 5 interviews conducted in French and transcribed in Romanian, a relevant translation was made, as close as possible to the source text.

#### 4. Findings and results

From the personal experiences of the interviewed employees, it appears that the activity performed in the call center using French is a very demanding one from an intellectual point of view, as the employee must use a language other than his mother tongue. For this study, we chose 14 employees of the same call center whose working language is French, half of whom are of Romanian origin, half of North African origin. Given this aspect of socio-demographic differences, employees do not seem to assimilate French as their mother tongue, although both parties have studied it since childhood. The experience of speaking in a language other than the mother tongue is, in the opinion of the employees, an indispensable one as most of them have professional experience in other countries, with other languages such as English, Italian, Spanish. However, the interviewed employees did not choose their job in the call center in order to improve their French language level, but to advance in their professional career, to earn extra income while they can continue their studies or because they were looking for a stable job during the pandemic.

The experience of speaking a foreign language is perceived by most interviewees as an opportunity for development on all levels and sometimes a necessary activity:

*I must say, you must not be afraid to make mistakes. There may be people who will judge you. But in principle, people are, they are ok. They appreciate the fact that you want to learn their language, appreciate the fact that you speak the language of their country. And now I think there are many, so many people who only speak their native language. (S5, 37 years old, 1 month of seniority in the company, Romanian)*

Referring to the literature review, we can affirm that, indeed, call centers facilitate the learning of languages and focus on learning and deepening them in the workplace (Lockwood, 2017). However, for employees who participated at this research, learning, and deepening their French was not the main reason they chose this job. In the study *Affordances for language learning in a call center*, Woydack et al. (2020) presented a series of facilitators for language acquisition taking into account the demographic aspect of the call center and the field of activity. Thus, call center agents use as their main means of improving the level of language the scripts that differ depending on the domain and help them to facilitate communication by telephone. Regarding the present research, the interviewed employees do not perceive the standardized

scripts and phrases as a means of learning, but rather as a robotization of the activity they carry out.

*I don't think I'd work in a call center anymore ... this is the last call center in my life. The call center is not for the future and even at my age you don't have to continue with a call center. It's not the future because it's a robot job, sit on your headphones and wait for everyone to swear at you, and I have to respect all customers regardless. (S6, 35 years, 2 years and 5 months of seniority in the company, Algerian)*

On the other hand, we could divide the perception of education by nationality, so five out of seven respondents of North African nationality said that the best time of their high school years was when they finished their studies because this meant that they would leave the country of origin:

*A memory that I fondly remember from school, I think when I graduated from high school in Tunisia because I knew I would leave the country? Yes, since I was very young, I wanted to leave Tunisia. (S7, 27 years, 6 months of seniority in the company, Tunisian)*

*Anyway, I never liked what I had in Tunisia, maybe just a bit. As soon as I graduated from high school and finished my duties there, I was very satisfied. It was a significant event. (S8, 25 years, 1 year and 10 months of seniority in the company, Tunisian)*

Furthermore, regarding the educational path, two out of seven interviewees of Romanian nationality talked about the unpleasant experiences they had with teachers who, apparently, applied teaching methods used during the communist period:

*It happened that he [the teacher] would call me like that, no one would escape, he would ask us to go in front of the class, at the blackboard and if we did something wrong, he would say 'you, stupid donkey', when he was referring to everyone he would say "You look like a cow looking at a new gate!" , if you know what I mean. And moreover, the experience happened in the urban environment, it's a pretty big town [Caransebes]. And I think it's the remnants of the communist era, the older teachers who have a more inefficient and outdated way of teaching, I don't know, probably at that time they were used to talking to pupils with superiority. (S3, 26 years old, 8 months of seniority in the company, Romanian)*

Following the discussions with the call center employees, we can also conclude that teleworking is still perceived as an advantage, an opportunity to spend more time with the family, and to save the needed allocated time to move between home and the company where the call center is based. Returning to normalcy, office work also has its advantages such as socializing with colleagues and supervisors, but employees would prefer to continue working from home or hybrid (with the possibility of showing their availability for the days spent at the office).

*It's fine from home. I'm not distracted by family members. Cause no one is allowed to enter this room where I work, while I work. My son comes in, he looks at me, and ... when I tell him to leave, he leaves. And closes the door smoothly. He understands very well, he's already big. I don't have a problem with him anymore. (S5, 37 years old, 1 month of seniority in the company, Romanian)*

*I really enjoyed the first few days when we had to work from home. I liked that we didn't have to go to the office anymore, that I didn't have to travel by tram, taxi and home was not as noisy as at the office, but after a year of working from home I have concluded that there is a lot, a lot better at the office than at home. From the point of view of health [coronavirus], with the current situation it is better to work from home, but in general I can state that for me, at the office, it is better than at home. (S6, 35 years, 2 years and 5 months of seniority in the company, Algerian)*





*Source: own research*

Moreover, in terms of the aspects that employees would change at work, we identified the following: the addition of the number of agents to cope with the high volume of calls, the possibility of extending the lunch break (more than 30 minutes), increase the time between calls (currently only 10 seconds), organizing team building, offering vouchers or diplomas for performance, improving communication between managers and employees, as they sometimes feel neglected because they do not take part of the decisions that concern them directly.

## **5. Conclusions**

Following the analysis of the research results, we can state that both the specific objectives and the main objective presented in the methodological chapter have been fulfilled. Therefore, we identified the perception on the causes and effects of occupational stress of employees of a call center in the banking field in Timișoara who carry out their lucrative activity in French. Achieving the following specific objectives was absolutely necessary for achieving the main goal: we identified the employees' perception of the factors that contribute to occupational stress and how it can affect their social life, what are the coping strategies and practices used by call center employees, but also if there are differences in the perception of occupational stress depending on nationality.

After analyzing the answers received in the interviews, we can conclude that the participants perceive the very high workload as the main stress factor. Although the number of calls received varies depending on the time of year/week or the time of day, employees feel that the team is understaffed and that the available agents are overexploited for the team to reach its target. Precisely because of this, some of the employees interviewed confirmed that sometimes, due to fatigue, they are tempted to extend the calls so as not to take over immediately after another, so that performance and productivity is negatively impacted.

One of the specific objectives of this research was to assess the possible differences in the perception of occupational stress depending on the nationality of employees. After analyzing the responses received from the interviewees, we did not identify the existence of such differences, the only point that could have generated a differentiation was the level of French language that could be more advanced among North African employees in Morocco, Algeria, and Tunisia. However, regardless of the country of origin, employees do not perceive French as their mother tongue, and the pressure of communicating in a foreign language with native customers is felt similarly for both categories of subjects. One of the introductory questions also aimed to identify whether there are differences in perceptions about employees' expectations of a job. This time, too, we did not receive answers that could be divided according to the nationality of the employees, as all interviewees stated that they wanted good working conditions, a salary commensurate with the work performed, respect, safety, and stability.

Regarding the coping strategies that employee's resort to at the end of a working day in which they had many calls and are very tired, actions such as walking in nature, but also isolation from technology and other people were mentioned during the interviews. Thus, depending on the duration and severity of burnout, negative social effects may occur. These include, at the individual level, isolation from others at work (the individual closes in on himself and no longer socializes with colleagues) or effects on privacy (problems in the relationship with his life partner, family, social isolation).

The general question of the research aims to identify the existence of a link between the negative perception of occupational stress and the option towards professional mobility of staff in a call center in the banking field in Timișoara. The applicability of the answers consists precisely in documenting strategies to control and reduce occupational stress that could reduce the high rate of staff turnover in the call center subject to this research. The answers received

from the interviewees lead us to confirm that there is indeed a link between the two aspects mentioned above, but professional mobility is mainly influenced by other factors such as the ambition and future projections of each individual, the professional experience and how the employee identifies with the values of the company he works for.

**Recommendations for the company:** Occupational stress has a negative impact on the high rate of turnover of call center staff both financially and resources consumed to complete new jobs. Strategies that should be implemented to reduce the high rate of staff turnover could be based on employee satisfaction at work, opportunities for career advancement, rewards, and recognition. we would thus suggest the creation of an internal survey to be filled in by all employees in which they could anonymously express their wishes and ideas for services improvement, but also for individual well-being. In this way, the employees would feel appreciated, feeling that their managers are taking into account their opinions. For the same approach, we believe that video call meetings (10-15 minutes and not in peak time intervals so as not to impact the service level) would help to strengthen interpersonal relationships between employees, both at the coworking level and at the level of employee - management. In order to reward the performances obtained by the employees, if it is not possible at the financial level, we consider that monthly tables / graphs of the ranking type could be elaborated, by which the employees who have been noticed by outstanding performances or productivity to be congratulated. An Employee of the Month program could also be developed, as well as internally e-mailed certifications for identified employees. Finally, we would like to conclude by stating that it is necessary to implement such strategies to motivate and reward employees in order to show them that they are appreciated for their efforts and teamwork; In this way, employees may reconsider their decision to leave their current job and may choose to further develop within the team.

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# WORKPLACE STRESSORS AND THE WORK-LIFE-BALANCE OF NURSING STAFF

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**Abstract:** *This scientific paper aimed to examine workplace stressors and factors influencing the Work-Life-Balance of nursing staff to understand potential risk factors and challenges. The Covid-19-pandemic has only again demonstrated the importance of sufficient and well-educated nursing staff. To ensure this, it is also important to consider the well-being of the nurses, because this influences their job performance, the turnover rate and the number of sick employees. To examine the workplace stressors and the Work-Life-Balance of nursing staff, different theoretical approaches and study findings are taken under consideration to determine their influence on the perceived stress of employees in general and nurses in particular and also the importance of a healthy Work-Life-Balance. The study was conducted by the Declaration of Helsinki and Tokyo. Many different factors make the job as a nurse potentially more stressful than for example administrative occupations. Moreover, there are plenty of difficulties for a healthy Work-Life-Balance for nursing staff and also potential negative effects resulting from a poor Work-Life-Balance or a high amount of workplace stressors. It can be concluded that a solution approach for the workplace stressors and a better Work-Life-Balance can only be reached if the employer and the employees work together to decrease the amount of stress, to offer and learn better mechanisms to cope with stress and to incorporate ways to ensure a better Work-Life-Balance.*

**Keywords:** *Workplace Stressors; Work-Life-Balance; Stress; Nursing Staff*

## **Summary Statement**

### **What is already known about this topic?**

- *The COVID-19 pandemic demonstrated the importance of nursing staff and due to this pandemic, the problem of the shortage of nursing staff gained a lot of attention.*
- *To make the job as attractive as possible, it is important to understand stressful factors and factors decreasing the Work-Life-Balance.*

### **Research Findings / Key New Information**

- *The workplace stressors are very diverse and depend very much on the character and the mental condition of the nursing staff.*
- *There are many potentially negative effects of the job as a nurse on the Work-Life-Balance, which have to be handled differently to ensure a great Work-Life-Balance.*

### **The Implications of this Paper**

*The research findings of this paper can help to improve the daily work of nursing staff and might therefore decrease the amount of sick leave/employee turnover.*

#### **1. Introduction**

To create a workplace and a job that motivates employees and enables them to develop their potential, it is not only essential to think about motivational factors but also about potentially stressful factors and to consider the overall happiness and well-being of well-being because these aspects will also influence their performance. In this article workplace stressors,

as well as the Work-Life-Balance and the Burnout disease will be taken under consideration with regards to their overall influence on an employee's job satisfaction.

### **Workplace Stressors**

If a person is continuously put under pressure and stressed at their workplace, this can lead to various negative consequences. First of all, the overall job performance of the person can be expected to deteriorate. Furthermore, stress can also influence the employee's health - not only psychologically, but also physiologically. The initiative for health and work (IGA) found out that physiological and psychological stress cannot only lead to depressions and anxiety disorders but can also cause muscular and cardiac diseases (Wirtschaftswoche, 2016). However, it cannot be generalised how long a person can be put under pressure until he becomes sick because it depends on the length of the stress, the intensity of the stress and also on the stress competencies and the overall resilience of a person, if and when he will become sick due to too much stress (Wirtschaftswoche, 2016).

### **Psychosocial Workplace Stressors**

Many different aspects can be perceived as stressful factors by employees. The German health insurance company AOK has identified fourteen stress-triggers, which appear most often at the workplace (AOK, 2019):

First of all, too much work, which has to be done in a short period, is often perceived as very stressful by the employees.

Secondly, employers who criticize their employees very much produce stress for them. Furthermore, problems with colleagues and permanent disturbances can cause stress. If employees feel over-challenged or are often annoyed by the circumstances at their workplace, it can also lead to stress. Employers who do not set clear goals or do not provide sufficient information about the work that needs to be done for their employees can lead to stress for their employees as well.

Another stressful situation is if the employees do not receive enough appreciation or recognition or do not receive enough comprehension of their employer and/ or colleagues for potential private or professional problems. Moreover, a lack of communication or unexpected changes without previous preparation or agreement can produce stress for the employees. The fourteenth stress-causing factor is if the employee perceives himself as being snowed under tasks and pressure, without having the possibility of setting priorities on his own. (AOK, 2019).

## **2. Specific Aspects regarding the Work of Nursing Staff**

### **2.1. Special Requirements of the Job as a Nurse**

In general, it can be stated, that stress is very individual, and everyone perceives and handles stress differently. Aspects like the personal attitude and mindset thought patterns and expectations towards the own work can increase the perceived workload and burdens. Many people perceive work as very burdensome when they are unsure if they will be able to handle the workload and satisfy the expectations. (AOK, 2011) Due to the special requirements and workplace situation of hospitals, the stress-situation for nursing staff cannot be compared to the stress of employees working in an office or a factory (Thor and Siegfried 2021a: 12).

According to the German Institute for Operational Health Promotion (BGF-Institut), most of the nursing staff have a very demanding and stressful job, not only physiological but also psychological. This is not only due to the poor health conditions of the patients, who often need a lot of help, but also due to high morbidity in hospitals, which confronts nursing staff far more often with death than people in other jobs are confronted with it. (AOK, 2011).

Furthermore, social and caring jobs are special in comparison to industrial or administrative occupations because the job itself is people-related, which result in special occupational ethics, conflicts and a unique way to solve these conflicts. Since the job

concentrates on the patients, it requires special methodologies and skills of the worker. For many people working in social and caring jobs, the focus of the job on people and not on things, like done for example in administrative occupations, is the reason why they choose this job. This can then result in people perceiving their job not as a simple job, but rather as their calling. This strategy has the risk of developing too personal relationships with the patients, of caring too much about the patients' problems and suffering patients and - summing up - of too high burdens for the nursing staff, which can result in psychological and physiological problems, for example, depressions and burnout and might force them to give up their job. (Enzmann and Kleiber 1989: 15-16)

The article "Occupationstediumm in the social services" states that the worker uses himself as his own tool and that the unique characteristics, which lead to his interest in social and caring work and which qualify him for these jobs, are also the characteristics, which make him more sensitive regarding work-related emotional pressures (Pines and Kafry 1978: 500).

Alfred Kadushin, a professor of social work, declared that the individual necessity of social and caring jobs is to give away a part of you emotionally, which results in the risk of emotional exhaustion. Additionally, this characteristic of social and caring jobs can lead to failures being perceived more personal and might cause that the helper questions his competencies, not only professionally but also personally. Moreover, the separation of work and free time is often not as easy as it is in other jobs because the job is closely connected to personal life. (Kadushin 1974: 715-719).

## **2.2. Impacts on the Nursing Staff**

In 1977 the German psychoanalyst Wolfgang Schmidbauer wrote a book called "Helpless Helper" in which he formed the term "Helpersyndrome", explaining it with the specific mental and psychological risks of helping jobs, especially about psychohygpsychogenic (Schmidbauer, 2016). This "Helpersyndrome" is also often understood as a too high willingness to help, which can be caused by the wish to be admired and liked (AOK, 2011). If this occurs, it can also lead to stress, especially if a person cannot meet his own requirements and if he does not receive enough appreciation for his help (AOK, 2011). The psychotherapist Thea Bauriedl says that the need to help other people is a normal human need but can become problematic if it becomes important for the person that other people depend on him (Zeit, 2006). These helpers might try to give other people, what they need on their own, which would then make them dependent on the recognition of the ones they are helping (Zeit, 2006).

Additionally, a survey revealed that many people working in psychosocial jobs have to handle several negative emotions and modes of behaviour, which result from work-related stress. Examples of these feelings are the wish to distance themselves from their patients, helplessness, decreasing engagement, depressions, decreasing motivation and exhaustion. (Schmidbauer 2016: 9) Moreover, the book "Helfer-Leiden" (Engl.: Helper-Suffering) states that the emotional burden is higher for nursing staff than for doctors because they spend more time with the patients, develop a more personal relationship with the patients and have to care for the patients, for example by listening to them when they are talking about their condition and their feelings, anxieties, etc., which makes it more difficult to remain impersonal and distanced (Schmidbauer 2016: 14).

A combination of stress triggers, which often appears for nursing staff, is a too high workload and at the same time a missing scope for decision-making and a missing influence on the workflows (AOK, 2011). The psychotherapist Gert Kaluza states that a disparity between an overspending at the workplace regarding the amount of work done and a not adequate reward for this work, for example by too low wages or not enough recognition, is also very likely to produce stress. He names this phenomenon the gratification crisis (AOK, 2011).

Several studies have shown that depressions, the Burnout-syndrome as well as a suicidal tendency is higher for caring jobs amongst other due to the high-stress level in these

jobs. Regarding stress-provoking factors, the riskiest ones are a too high workload, missing support and too many responsibilities, in addition, to shift working and conflicts with colleagues and employers. (Naumovska 2015: 73).

Since peoples' reactions to stress depend on their character, but also their coping mechanisms, companies can help their employees - not only to reduce stress but also to cope with existing stress, for example by learning meditation techniques or offering yoga, other sports and conversational therapies.

### **3. Work-Life-Balance**

Work-Life-Balance is "the amount of time you spend doing your job compared with the amount of time you spend with your family and doing things you enjoy" (Cambridge Dictionary, 2019). If the proportion between these two is not balanced, a Work-Family or Work-Life-Conflict can develop. The role conflict models are based on the scarcity theory of Goode "which assumes that personal resources, such as time and energy, are finite and that the devotion of greater resources to one role necessitates the devotion of lesser resources to other roles" (Goode, 1960).

Work-Family-Conflicts occur "when the pressures from the work and family domains are mutually incompatible, and as a result, participation in the family role is made more difficult by participation in the work role" (Greenhaus and Beutell, 1985). Work-Family-Conflicts are more likely to be experienced by women because they have a role overload more often. This difference is because women spend more time on non-work actions like caring for children, elderly people or housework (Meenakshi et al. 2013: 33).

According to Greenhaus and Beutell (1985), a Work-Family-Conflict "is a form of conflict that occurs when the energy, time, or behavioural demands of the work role conflicts with those of the family role. It has the underlying assumption, that the requirements and expectations of the workplace often do not fit the requirements of family life, which will then cause conflicts (Kahn et al., 1964). The Work-Family-Conflict is "an extension of Work-Family-conflict reflecting that the work role may interfere with individual's other personal life roles and interests. Besides the family role, these can range from time for friends, exercise, military service, education, having time for self and recovery, volunteering or being active in religious organisations" (Kosseck, 2016).

#### **3.1. Current Situation in Germany**

The Organisation for Economic Co-operation and Development (OECD) published a survey in 2010, which shows that the Work-Life-Balance impaired over the last years. In 2010, Germany reached a score of 2.62, while this score had increased to 2.74 in 2010 (Zeit, 2014). The Initiative for Health and Work (IGA) found out that permanent availability can cause health problems (Zeit, 2014). Furthermore, they found out that two-thirds of the working population continuously work overtime, 25% state that they often have to cancel activities with their family or friends because they need the time for relaxation, 22% of the interviewed people state that they have to be reachable in their free time for their employer and 20% feel pressured by their employer to achieve more (Zeit, 2014).

On the other hand, the Work-Life-Balance becomes more and more important to employees. According to a survey published in 2019, 55% of the interviewed persons would rather like to work four days a week and would also accept less money if they would get more time off in exchange. In 2018, this score was only 49%. Employees working in a four-workday-model are more productive and also more content with their job. (Frankfurter Allgemeine Zeitung, 2019)

#### **3.2. Importance of the Work-Life-Balance**

A lack of Work-Life-Balance can have various negative effects: Impaired health, higher consumption of alcohol and cigarettes, weight problems and psychological diseases like

Burnout. On the other hand, a great Work-Life-Balance can lead to decreasing rates of Burnout, fewer health problems and also higher productivity because the person can concentrate on the work he is currently working on and not focus on other things at the same time (Australian Institute of Business, 2019). These aspects can then result in higher motivation due to better job satisfaction.

### **3.3. Organisational Influence on the Work-Life-Balance**

The Federal Ministry for Family, Seniors, Women and Youth of Germany (BMFSFJ) analysed the economic effects of actions supporting the Work-Life-Balance. According to the BMFSFJ, a requirement to ensure employee loyalty, motivation and readiness for action is a great Work-Life-Balance (Bundesministerium für Familie, Senioren, Frauen und Jugend 2005: 14). Furthermore, employee engagement and trust in the company influence how far an employee uses his whole potential, which can then have an important influence on the organisational success. Actions taken by companies can be divided into single instruments and extensive concepts and have the aim to create a balance between the companies' interests and demands and the employees' interests and demands (Ibid: 14).

Organisational actions to improve the Work-Life-Balance can be divided into three different types: First of all actions to prove the integration of work into the employee's life and a result-oriented service provision, for example, part-time jobs or sabbaticals (Ibid.:15-16). Secondly, actions to make the location and the time when and where an employee is working more flexible, for example, job-sharing, mobile work and flextime (Ibid: 16-17). And the last aspect is to increase employee loyalty, for example by offering support for childcare, mentoring and employee benefits like health check-ups and gym-memberships (Ibid:17-19).

Several studies have shown the positive effects of actions supporting the Work-Life-Balance. To begin with, they have a positive effect on companies, as they increase employee loyalty and motivation and can lead to a better organisational culture. Moreover, they can also influence the customer relationships, investor relationships and the perception of the society of the company positively (Ibid: 26). In addition to that, they influence the employee positively, for example by increasing his learning achievement, improving his social and family relationships and causing more participation in the society, for example by voluntary work (Ibid: 28-29).

Furthermore, a better Work-Life-Balance can make it easier for women to accommodate a job and a family, which will then produce a higher household income and this can then positively influence the economic situation of the country because the household is spending more money (Ibid: 29-30). The last positive aspect of organisational actions improving the Work-Life-Balance of their employees is the stabilisation of the society (Ibid: 30). An example for this is that a better Work-Life-Balance offers the employee a better scope of action, in which the employee has more opportunities regarding the structuring of his free time and can participate more in the societal life (Ibid: 30-31).

## **4. Work-Life-Balance for Nursing Staff**

Several aspects make it much more difficult for nursing staff to maintain a Work-Life-Balance. Shiftwork and working on the weekends are aspects, which many people do not have to cope with in their professional life, but nursing staff in hospitals always has to.

### ***Sleep Disorders***

The German Society for Sleep Research and Sleep Medicine (DGSM) found out that shift workers have to handle several problems: First of all, their shift times often lead to sleep disorders because the people do not have regular sleep patterns like people with a nine to five job (Deutsche Gesellschaft für Schlafforschung und Schlafmedizin 2011: 3). The average value



of people having sleep disorders in German society is 33%, while 80% of people working in shifts have sleep disorders (Süddeutsche Zeitung, 2011).

### **Health Problems**

In addition to that, shift workers have a general higher predisposition to get sick than people, who do not work in shifts (Deutsche Gesellschaft für Schlafforschung und Schlafmedizin 2011: 3). Even the risk to get cancer is higher, due to the unsteady day and night rhythms. Furthermore, the gular mealtimes often cause gastro-intestinal diseases and cardiovascular diseases. (Süddeutsche Zeitung, 2011)

### **Social Problems**

Moreover, shift work also causes problems in the social and family life because the person, who works in shifts, has to sleep in the daytime, is tired or sick due to the shift work and it is often more difficult for people, who work in shifts, to care for their family and spend time with their friends than for people, who have a normal job rhythm. (Deutsche Gesellschaft für Schlafforschung und Schlafmedizin 2011: 3)

### **Performance Problems**

According to Sulley and his model of "Circadian Rhythm of Biological Functions", the error frequency is very high during the nighttime. The often-occurring sleep disorders lead to an impaired regeneration of the body, which results in a lower performance capability caused by the sleep disorders on the one hand and the other hand, a general higher error frequency caused by the night time. (Ärzteblatt, 2006) These factors can increase the number of mistakes, which a nurse does and can therefore not only be considered important for the nursing staff but also the patients and the hospital because it potentially endangers the patients. Additionally, it can be considered important for the Work-Life-Balance because it can be expected to influence job satisfaction and self-esteem negatively, if a person makes more mistakes due to the above-mentioned effects of shift work and working during the nighttime (Thor and Siegfried 2021b: 7).

It can be summarized that the effects of shift work influence the Work-Life-Balance negatively: Not only does shift work lead to sleep disorders and health problems, it also causes social and family problems and can lead to decreasing job satisfaction and self-esteem, but also a potential endangerment of patients. All of these factors influence the overall feeling of a person having a balanced professional and personal life. Therefore, nursing staff has to cope with many difficulties, which can lead to an imbalanced personal and professional life.

Summing up, companies have many possibilities to support their employees' Work-Life-Balance. These opportunities do not only potentially influence the employee positively but can also have a positive impact on the organisational success and external factors like the perception of the society towards a company. Even though many actions supporting the employee Work-Life-Balance are costly, they can be considered an important and great approach to increase the success of the company.

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# CHILDREN AND TEENAGERS DURING PANDEMIC IN ROMANIA. A VISUAL APPROACH TO ACTIVITIES ASSOCIATED WITH ADAPTATION TO SOCIAL ISOLATION

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**Abstract:** *The Covid-19 pandemic had a major impact on social life, affecting a fundamental characteristic of humanity: the manifestation of sociability. For children and teenagers, the pandemic meant a drastic reduction in formal and informal social interactions, both necessary for their mental development. The total lockdown in Romania lasted two months, during which time we collected visual data in the form of photographic journals. In this paper, we present a visual essay based on photographs in which parents showed us what isolation was like for their children. The visual essay is an alternative form of presenting the results of research in socio-humanities, which form is more accessible to the non-specialized public. Our essay illustrates the adaptive capacity of families with children and teenagers to the situation of social isolation imposed by the Covid-19 pandemic.*

**Keywords:** *children; pandemic; isolation; visual data; photovoice; visual essay.*

## 1. Introduction

The Covid-19 pandemic has had a major and unusual impact on social life. All over the world, the main measures to reduce the infection rate and mortality have been related to social isolation and social distancing. These measures were difficult for the world's people to bear because they were long-lasting and affected one of the fundamental characteristics of humanity: the manifestation of sociability.

Since March 2020, when the World Health Organization declared the disease caused by the Sars-Cov-2 virus a pandemic, most aspects of social life have been deeply disturbed, and mankind has entered one of the worst health and economic crises known to the modern world. In the first part of the pandemic, during 2020, in the absence of a vaccine or specific treatments, strict hygiene rules and the reduction of social contacts were the main measures taken by world governments in an attempt to reduce the spread of the new virus. However, these measures have significantly affected ordinary social life because "social distancing implies that people may be unable to conduct some of their daily routines, which may have negative consequences in perceived wellbeing" (Ares et al., 2021: 2). Basically, the new virus has put the entire planet on alert and dramatically changed our ways of social interaction and daily routines (Saggiaro de Figueiredo et al., 2021).

## 2. What did lockdown mean for children and teenagers?

For children and teenagers, the pandemic meant a drastic reduction in formal and informal social interactions, both necessary for their mental development. The rules imposed during lockdown periods meant limiting social life to the private environment; whereas social gatherings with relatives or friends were significantly banned or reduced. Furthermore, the closure of schools and other educational institutions made impossible the physical interaction with teachers and colleagues, fundamental social groups in the process of socialization and personal development; the former have an important role as trainers and models, and the latter are the category called by sociologists "peer-groups" and have a major role in building identity and in the emotional development of children and adolescents. And precisely because they are

at a critical stage in life for their physical, emotional and social development, children and teenagers need special care for their mental health (Marques de Miranda et al., 2020).

Recent studies have highlighted numerous preoccupations and concerns about the impact of the Covid-19 pandemic on the mental health of children and their parents, in conditions of social isolation (Katz and Cohen, 2020). Mass-media also frequently transmitted, during the pandemic, content related to the disadvantages and problems of online learning and social isolation. The dynamics of family life changed, integrating the function of home schooling. Teachers and pupils had to adapt very quickly to the forms of distance learning. Parents often felt exhausted, overwhelmed by the multitude of tasks related to household chores, managing intra-family relationships and the needs of supervision and support for their children in the new technology-assisted learning process. In the case of disadvantaged communities, many students had limited access to online educational resources. There were protests and a lot of pressure from parents to get their children back to school.

All these new and unusual experiences associated with living the pandemic led to “stress, anxiety and a feeling of helplessness in all” (Singh et al., 2020: 1), and children and teenagers were even more affected than adults by these disorders. Insufficient physical activity associated with prolonged exposure to digital technology and the lack of social interaction during periods of isolation are considered major concerns, which may lead to future health problems for children (López-Bueno et al., 2021). During the lockdown period, the specific psychiatric disorders increased significantly among child and adolescents, and “emotional disorder was found significantly higher among the subjects who had lost their family members by death due to COVID-19” (Mallik and Radwan, 2021: 7). Singh et al. (2020) reviewed various articles about the impact of the Covid-19 pandemic on the mental health of children and adolescents and analysed them thematically, emphasizing a number of issues identified by research, but also recommendations proposed by professionals. In general, children and adolescents were confronted with stress and emotional or relational problems caused by isolation and lifestyle change. The closure of schools and other institutions dedicated to education and socialization produced “debilitating effects” in children and youth “as they experience loneliness, anxiety, and uncertainty. Compulsive use of internet gaming and social media puts them at higher risk” (pp. 8-9). The pandemic had a significant impact on the mental state of children, who frequently reported stress, anxiety, sadness and anger, as shown by the data of Childline Support Centre Japan, cited by Isumi et al. (2020).

Some authors (Saggiore de Figueiredo et al., 2021) draw attention to the possible risks to which social isolation exposes children and adolescents, given that schools were closed for long periods, outdoor activities were significantly reduced and the time spent on the internet and social media was extended: “The withdrawal from social life, daily activities, as attending to school, combined with fear, anxiety and the feeling of the unpredictable, increase the risks for this group to develop psychiatric disorders in the future” (p. 5). For some children and adolescents, more quality time spent at home with parents and other family members can be a positive element, which does not automatically lead to stress, anxiety or other mental disorders; however, in other cases, when the family environment is not harmonious or when families live in poverty and social marginalization, socio-economic difficulties can add to those related to the pandemic, amplifying stress and widening the scope of problems experienced by children and teenagers.

But it wasn't easy for the parents either. During the pandemic, children's screen time increased and this was associated with problems in the interaction between parents and children (Ozturk Eyimaya and Yalçin Irmak, 2021). Parental intervention to maintain a regular timetable of children at home and to establish healthy habits are seen as strategies that can minimize “potential health damage in isolation” (López-Bueno et al., 2021: 4). It was a great challenge for the parents to support the children in the activities required by the distance school and to reorganize the daily schedule of the family according to the new educational needs. According to Isumi et al. (2020), these new challenges meant an increase of “parental stress, in

addition to stressful situations of parents themselves (i.e., supporting their children while working from home, lack of social support due to social isolation)” (p. 3). During lockdown periods, parents spent more time with their children, which in some cases meant that one parent was unable to work (Ares et al., 2021). Their role was not only to economically support the functionality of families in the new conditions imposed by the pandemic, but also to provide children with support, through communication and interaction, and to avoid excessive use of screens by children (Ozturk Eyimaya and Yalçın Irmak, 2021).

In an extensive online survey conducted in China, Dong et al. (2020) explored the parents’ beliefs and attitudes about their children’s distance education and showed that “the implementation of online learning during the COVID-19 pandemic has been problematic and challenging for Chinese families” (p. 7). The participants to this research considered online learning during pandemic was less effective than traditional learning and stated that, in general, their children were “uninterested, inactive, and unfocused during online learning” (p. 7). And in terms of the atmosphere at home and the relationship within the family, a study conducted in Uruguay showed that most of the parents surveyed reported positive effects of isolation, in conditions of a longer time spent together in the family; nevertheless, situations of conflict or difficulties in communicating and interacting with children have also been reported (Ares et al., 2021). Moreover, for the parents with a precarious socio-economic condition, the problems generated by the needs and costs associated with organizing the children’s activities at home during lockdown periods are very difficult to manage and solve (Saggiore de Figueiredo et al., 2021), and parental tensions and stress can be reflected in children’s feelings and behaviour.

The fundamental idea guiding most recent studies is that children and adolescents are a vulnerable segment of the world’s population in the face of the psychological and social threats and risks posed by the Sars-Cov-2 virus and that “there is a need to reduce the mental health burden of this pandemic” (Marques de Miranda et al., 2020: 7).

### **3. Description of the study**

The lockdown in Romania lasted two months (between March 16th and May 14th 2020). During this period, the citizens’ movement in public spaces was restricted, it could only take place on the basis of a statement and with a well-defined purpose, predefined by the state authorities. Kindergartens and schools were closed, as were playgrounds or parks.

As sociologists, we thought that we might never encounter such an exceptional situation in our professional life and that it would be good to study the way people live in isolation, this strange, completely new period in their lives for which no one and nothing before has prepared them.

We thought of applying a special data collection technique that we considered very appropriate in the given situation - collecting elicited visual documents.

Photography has become a daily activity for most of us. Phones now allow photos to be taken easily and applications enable us to instantly send them to others. Not only in the daily life of people has photography become a constant presence, but also in the professional life of many sociologists. We are among those who have been convinced, through our studies, that visual data are as relevant and suggestive in social research as textual or numerical data (Scârneci-Domnişoru, 2020).

Therefore, we used photography as a data collection technique, more precisely we asked our subjects to photograph the situations they consider relevant in living the experience of social isolation imposed by the pandemic. With the help of the internet, our research followed all the rules imposed by the lockdown because the data reached us without the need for face-to-face interaction with the participants in our study.

Hence, we asked the participants to take photos illustrating what it means for them to be isolated, how they live this novelty in their lives; we also asked them to write a short text or

a suggestive title next to the pictures to help us better understand what they wanted to convey to us. So, we applied the photovoice technique in an attempt to give voice to ordinary people in Romania, usually very free, unexpectedly faced with the imposition of unprecedented restrictions. 30 people participated in our study (women and men aged between 19 and 71 who live in the urban or rural area of Braşov County, Romania). Eventually, a few photo diaries resulted, because the participants in the research sent us frequently, some of them even every day, by e-mail or WhatsApp, photos taken by them during the isolation, when they thought they were doing or feeling something they would not normally have done or felt.

We obtained 380 photos that we coded thematically (Braun and Clark, 2012). Most of the photos illustrated necessary activities, but which they now did more often, which they were now willing to learn, or which they now had to do on their own, without help (for example, cooking, cleaning). Many illustrated, in the first days of isolation, changes related to work, its transition to online, to the problems generated by it and then, more and more often, towards the end of isolation, to the advantages of working online. There were also many images related to activities that they had kept postponing, for which they had never had enough time (for example hobbies, DIY). They also photographed what helped them get over the period of isolation – their loved ones, nature, pets.

Our participants who had minor children sent us a lot of pictures about them. 16 of the participants were in this situation, and their photographic diaries turned in some cases into diaries of the way their children lived in isolation. In all these cases, they are functional families, who do not face relationship problems, poverty or social marginalization and can be considered as belonging to the middle class. In most cases, families with children spent the lockdown period at home, but there were also a few situations in which our subjects stated that they moved for a longer or shorter period to grandparents in the country, just to provide children with a greater connection with nature, with pets and the opportunity to spend more time outdoors.

We chose for this article to select the photos sent by our subjects that referred to the way their children experienced isolation. We will present the results of the processing and analysis of these photos in an unusual, visual form. In our opinion, the results of studies, especially when the data collected in research are also visual data, are worthwhile and should be presented more often in other forms than the classic research reports. One of the artistic variants of presenting the research results, very easy to do at the end of our research, was the visual essay.

#### **4. The visual essay as an artistic way to present the results of a scientific research**

Many of the sociologists who do not carry out their activity in the academic environment have to present their research results to non-specialized audiences. The public may include, for example, authorities, study participants or other ordinary people, people who are not aware and not too interested either in learning about sociological theories, methodological terms, concepts, etc.

Especially for these situations, we think that we should emphasize more often that there are alternative forms of presenting the research results, forms more accessible to the non-specialized public. For example, one can make exhibitions, one can stage plays, one can present documentaries, etc. For example, Pink (2008) made a photo exhibition with people with disabilities faced with situations in which the physical arrangement of the city restricts their mobility. The viewers understood in this way much better and easily, empathetically, the results of her research.

The most accessible alternative ways of communicating new knowledge include the artistic means and of these, the visual ones are the most spectacular, having the most important communication advantages. Images are much more suggestive than texts and numbers. They capture the ineffable, have a greater impact on the public, are memorable and facilitate empathic understanding (Weber 2008). Among the visual artistic means of presenting the research results, visual essays are the easiest to make, they do not require much effort, nor

much knowledge or talent. In addition, the visual materials to be used in the essays are at hand, and can come from the archive created during the data collection. In Scârneci-Domnişoru (2019) the author showed that a well-equipped social researcher must know not only how to collect data from both a university professor and an illiterate person, but also how to communicate the results of the research to the academic community and the general public. Because the social sciences have ordinary people as subjects and direct beneficiaries, it is necessary to know how to return to them the scientific results, to know how to communicate scientific knowledge to their understanding. Social knowledge has no applicative value if we keep it only for us specialists, if we do not translate it to those who are able to make decisions, to those who have the power to change the lives of people and human entities. Therefore, artistic means can be a solution in the many situations in which the classical scientific communication of the results cannot be taken into account or is not enough. As the author argued in Scârneci-Domnişoru (2019), ignoring these variants of public exposure of research results generates a great waste of information, ideas, knowledge and implicitly of understanding, attitude, change, progress. Therefore, in order to convey in an accessible way the results of our research on how parents perceived the isolation of their children, we conducted a visual essay. The results of our research could be listed in descriptive, possibly explanatory, sentences, as most pandemic researchers did in their reports, which we cited above in this article. But we chose to make an alternative presentation of the results to highlight its advantages. So you can find below, in the pictures, what our children did in isolation.

### 5. Our children in isolation

Home was kindergarten or school for the children.



*Parental consent was received, in order to use the photos in which their children appear.*

But most of all, the house was a playground. The classic games, better to play outside, in other children's company, moved here...



Hide-and-peek...

Drawing...

Camping...

*Parental consent was received, in order to use the photos in which their children appear.*





Climbing...

*Parental consent was received, in order to use the photos in which their children appear.*

... but new games were also invented here.



*We are astronauts!*

*We're taking flight! To Mars, Captain!*

*Parental consent was received, in order to use the photos in which their children appear.*

The children were entertained with educational games...



*Today the numismatics lab ... We also have a microscope!*

*Parental consent was received, in order to use the photos in which their children appear.*



*Is it sinking or floating? One day's work*

*Parental consent was received, in order to use the photos in which their children appear.*

... or they invented some that mimicked activities of daily living before the pandemic.



*Puppet theatre*

*Restaurant*

*Rural store BEAPHI*

*Parental consent was received, in order to use the photos in which their children appear.*

For those who live at home, the garden and the yard have happily supplemented the parks, playgrounds or relaxation areas.



*We have a new car.*

*Parental consent was received, in order to use the photos in which their children appear.*



*Listening to music Sunbathing*

*Parental consent was received, in order to use the photos in which their children appear.*

They learned a lot about nature, about plants and animals. They had more time to play with non-speaking friends.



*We feed kittens, pigeons and look for snails.*

*Parental consent was received, in order to use the photos in which their children appear.*



*Pets*

*Parental consent was received, in order to use the photos in which their children appear.*

They had more time to learn how to do things at home or in the garden, they cooked, they helped with spring cleaning.

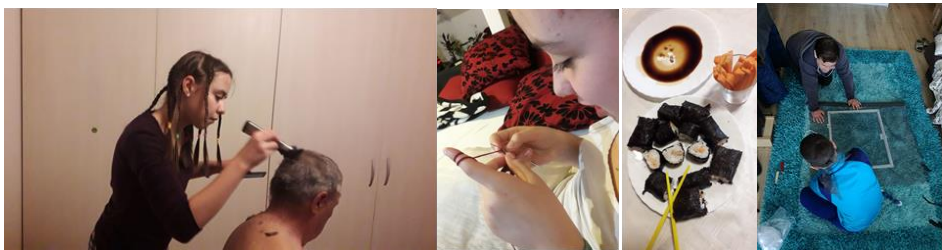






*Today we are learning to grill. Washing the dog! Gathering wood.  
Parental consent was received, in order to use the photos in which their children appear.*

And they tried all kinds of trades: barber, cook, carpenter, farmer, learned to crochet, to tinker etc.



*In time of plague, even stone breaking can be fun!  
Parental consent was received, in order to use the photos in which their children appear.*

It is true that they used the tablet and the phone a lot, they watched more TV, but they also had time for forgotten hobbies and passions.



*Parental consent was received, in order to use the photos in which their children appear.*

It is true that they played alone, in rather deserted areas...



*Parental consent was received, in order to use the photos in which their children appear.*

... that their play was stranger...



*Playing the virus*

*Night travel statement*

*Parental consent was received, in order to use the photos in which their children appear.*

... that they craved all sorts of things they couldn't have...



*I made a burger, ice cream and macarons of clay. I've been thinking about them for 3 weeks and, if I can't eat, I made them of clay, to satisfy my cravings.*

... and that they sometimes exaggerated.



*Parental consent was received, in order to use the photos in which their children appear.*

But it was wonderful, a time like no other, with their parents just for themselves.



*Parental consent was received, in order to use the photos in which their children appear.*

## **6. Discussions**

We built a visual essay with the photos in which the parents showed us what the isolation was like for their children. Subjects with minor children (representing the majority of participants in our study) captured in images many of their activities. Isolation was a period in which they had children permanently by their side, in which they had to take the place of teachers, playmates, friends, etc. It doesn't seem to have been a waste of time for the children at all, they had the chance to do many and varied things, to learn a lot, they had access to things that they would not have done or for which they would not have had time in normal times.

The visual data collected by us reflect the changes that the pandemic imposed on families with children and adolescents, discussed in the recent literature: isolation at home, online school, reduction of social gatherings, more time spent by parents at home to supervise their children, etc. However, unlike most recent articles, which highlight the stress and problems created by the pandemic in families with children and adolescents, most of the visual data we collect present rather situations associated with creativity in finding solutions to adapt to social isolation and with the positive aspects of family relationships.

We can be dealing here with a limitation of the use of visual data when we talk about privacy: people probably want to immortalize in images the favourable, positive situations related to their acceptance and appreciation by others. But it is possible that we can also be dealing with an advantage of using visual data in research, in the sense that they can supplement the data collected with the help of classical means. There are aspects that people do not choose to talk about, that they do not remember on the spot, during the interview or questioning, that they think would not be of interest in a discussion with a researcher. Photography allows them greater freedom in "confession", a deviation from the classic pattern of discourse of a participant in a research. In this way, verbal or numerical data collected in projects can be supplemented (or even contradicted) with visual data.

We dare say the visual data collected by us reflect a real situation, one in which families have made significant efforts to recreate a state of normalcy in an extremely difficult global

situation. We believe that the alternative presentation, with a visual approach to life situations during social isolation, can add value to research and highlight the positive aspects of adaptation, especially where we are talking about children and adolescents, eager to meet their needs of attachment and emotional development.

Our visual essay highlights innovative ways in which parents have provided support to their children through communication and interaction, helping them to avoid excessive use of electronic devices (Ozturk Eyimaya and Yalçin Irmak, 2021) and tried to reduce the psychological burden of stress and anxiety (Singh et al., 2020).

In conclusion, the visual data collected by us illustrate the adaptive capacity of families with children and adolescents to the situation of social isolation imposed by the Covid-19 pandemic, showing that beyond stress and relationship problems, families have been able to increase their cohesion and work together to develop new ways of dealing with an exceptional and threatening situation in terms of health and life itself.

### **7. Professional ethics and deontology**

In our project we made sure that the participants in the research are informed about the purposes of the research and about how we will use and publish the data. We received parental consent to use the photos in which their children appear.

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# FEMININITY AT THE HELM OF A GENDERED MOTORCYCLE WORLD WHAT STANDS BETWEEN A WOMAN AND A MOTORCYCLE?

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**Abstract:** *In a world translated in gendered social roles, the motorcycle universe has been always associated with symbols as freedom, rebellion and outlaw activities, becoming an extension of masculinity. This article proposes an analysis of women relationship to motorcycle in a man's world and what are the elements that trigger the passion of riding a motorcycle. Based on a research of sociological literature, this paper explores three categories of women motorcyclists: „biker babe”, „ol' lady” and „solo rider” (Buchan, 2013), emphasizing that the symbolic portrayals started from representing women as a sexual object, an accessory of the man besides the motorcycle that enhance his masculinity and developed to the image of freedom and independence on two wheels breaking the gender barriers. In a nutshell, riding a motorcycle becomes a fertile ground for further sociological studies on how masculinities and femininities are defined, without excluding one another.*

**Keywords:** *gender; motorcycling; femininity; masculinity; gendered society.*

## 1. Introduction

The world of motorcycles gained momentum with the end of World War II, being associated with the return of veterans home and their desire to express masculinity. Starting from this point of view, the motorcycle becomes an extension of masculinity, outlining an exclusive world of men. Thus, women did not belong to this world, their relationship with the motorcycle being most often born as a result of interacting with men (Martin et al., 2006; Thompson, 2012a, 2012b; Borstlap, Saayman, 2018). In fact, the association between women and motorcycles has been made in sociological research from two standpoints: the role of women in men's motorcycle clubs (Quinn, 1987; Hopper, Moore, 1990; Thompson, 2008; Maas, 2013) and motorcycling as a mean of leisure for women (Auster, 2001; Joans, 2001; Glamser, 2003; Roster, 2007). Gabriel Jderu (2022) offers an interesting approach regarding the relation between women and motorcycles maintenance and repair activities. Starting from the idea that the motorcycle world continues to be a gendered complex and a mean of expressing male dominance, Jderu (2022) identifies three types of strategies regarding women in motorcycles repair activities: "as `emotional workers` (Hoshchild, 2003) in a social network of male motorcyclists, as performers in an apprenticeship around repairs shops, in order to learn to make minor repairs or as actors seeking maintenance and repair autonomy to perform minor maintenance or repair operations on their own". From these interpretations I can draw two conclusions: first of all, they are a proof of the fact that gender personalizes motorcycles world and at the same time, an effort to show how women are adapting to male activities, like maintenance and repairs. In addition, the relationship between women and motorcycles generates complexity, which lead to an interesting field of study. Thus, the studies did not focus on the analysis of the way in which women shape the world of motorcycles, starting from the way they are organized in clubs and up to the personalization of the equipment and the motorcycle. This essay aims to analyse and deepen the representations of female motorcyclists in the sociological literature, by highlighting their relationship with the motorcycle. Thus, regarding the structure, the research starts from an analysis of studies that assess how the role of women in the world of motorcycles has evolved, taking into consideration three categories highlighted by Buchan Jennifer (2013) in her master's thesis entitled "Under the Helmet and

Between the Legs: Images of Women on Motorcycle Magazine Covers from 1937-2011": "biker babe"- the woman as a sexual object, symbolizing as the motorcycle an extension of masculinity, "ol 'lady"- the woman who is in a stable relationship with a motorcyclist, but she is not allowed to be a member of a men's motorcycle club and "solo rider" - a first expression of the female motorcyclist, who is at the helm of the motorcycle. Furthermore, based of Jderu Gabriel's (2014) approach according to which becoming a motorcyclist develops as a social career, the article follows the way in which the passion of women for riding a motorcycle is born.

## **2. Women portrayals in motorcycle world**

In her dissertation entitled "A Qualitative Exploration of Female Harley-Davidson Apparel Wearer's Symbolic Expression of Identities Through Dress", Amy Jo Shane-Nichols (2020) reviews the presence of female motorcyclists in the history of Harley Davidson motorcycle manufacturer. Thus, between 1920 and 1930, Harley Davidson supported the idea that women motorcyclists should have their own motorcycles, a fact also found in media publications (2020: 5). However, the war has contributed to the reconfiguration of the structure of the American family, by the emergence of new opportunities for women who have been forced to assume specific roles of men, in their absence (Blankenship, 2014: 27). This tendency was limited by the end of the war and by the assumption of society's perspective according to which women had to return to their previous habits, such as taking care of the household and family. In 1948, Harley Davidson commercials portrayed the woman as a passenger on a motorcycle. Later, in the 1960's, marketing campaigns promoted the motorcycle as a way for men to attract women (Shane-Nichols, 2020: 5). Between the 1960`s and 1970`s there was a decrease in the number of female motorcyclists, in 1970 only 1% of all motorcyclists were women (ibid). Over the next ten years, the women's motorcycle movement reborn, as emphasized by Harley Davidson's creation of the "I Am Woman, Hear Me Roar" campaign and the creation of the "Ladies of Harley" subgroup within the Harley Owners Group. A report of the Motorcycle Industry Council (2018) states that the number of women motorcyclists in the United States has evolved from 10% of all motorcyclists in 2009 to 19% in 2018. In terms of distribution by age groups, between 24 and 38 years old, 26% of the motorcyclists are female and, between 39 and 53, 22%.

Buchan (2013) proposes in her master's thesis entitled "Under the Helmet and Between the Legs: Images of Women on Motorcycle Magazine Covers from 1937-2011" an analysis of the portrayal of women motorcyclists in publications dedicated to motorcycles from 1937 to 2011. Based on the premise that image content analysis can provide a better understanding of how stereotypes and biases affect women, Buchan (2013: 2) sets the theoretical framework for analysis around four categories: hegemony, gender and sexuality, pornography and the use of images to control perception. The research results highlighted three typologies of female motorcyclists represented in the sample of selected magazines (Buchan, 2013: 12-14). "Biker babe" is the first typology identified by the author, the woman being represented as a sexual object for men, which defines the relationship between the female and male hierarchy. Regarding the feminine pattern, "biker babe" is a white woman, attractive, thin and with less clothes. Concerning the relation with the motorcycle, "biker babe" does not interact with it, being rather represented next to it, as an accessory of the motorcyclist man. Thus, in this image of three entities, the man is the center, while the woman and the motorcycle become responsible for proving his masculinity.

Social representation of „biker babe“ appears also in man's motorcycles clubs, translated in a number of roles that become an expression of a relationship of subordination to men (Quinn, 1987; Hopper, Moore, 1990; Wolf, 1991). Thus, one of the basic rules is related to the prohibition of a woman's membership in men's motorcycle clubs. Wolf (1991) argues that this norm is a social manifestation of distributing gender roles within society. The construction of the image of dominance and aggression of the man is done by antithesis with the embodiment of the woman as passive and obedient. Quinn (1987) points out that the presence of women in

a motorcycle club can be represented by: women who have temporary relationships with several members of the club, women who prostitute or practice striptease to bring income to the club or women who are in a long-term relationship with one of the club's motorcyclists (either wife or not). The latter category, as well as the second, is obliged to provide income to his motorcycle partner so that he can carry out his activities within the club. From the point of view of the status of the three categories of women in the group, women who are in a serious relationship with one of the members of the group enjoy the protection of the club. However, Hopper and Moore (1990) point out that both women who were available to all members of the club and those who were involved in a long-term relationship wore signs announcing that they belonged to the whole group or to a certain member. On the other hand, women involved in long-term relationships could be forced by their partner into prostitution or could be sold to other men (Hopper, Moore, 1990: 372). From the perspective of patriarchal subjugation in front of the man, these perspectives tend to portray the woman as an object intended for pleasure or income. Moreover, Thompson (2008) points out that motorcycle advertising used the image of women as sexual objects to attract men into the motorcycle subculture.

In "Making Sense of Motorcycle Brotherhood: Women, Branding, And Construction of Self", Maas (2013) considers that the woman's position of subordination in front of the man in the motorcycle clubs has changed since 1980. Thus, sex was used for fun and gratification, and later the motorcycle clubs became more or less legal profit-oriented organizations (Maas, 2013: 9-10). However, this transformation did not necessarily mean a change in the perspective of motorcyclists on women, maintaining their inferiority in the world of men. An explanation of the perpetuation of patriarchal beliefs is related to the supremacy of the club over family or personal life, so the motorcyclist dedicates and sacrifices his life in support of the fraternity, being convinced that his activities are important and appreciated.

The next category in motorcycle magazines is the so-called "ol' lady" (Buchan, 2013: 13). In terms of physical characteristics, it is white, but it is not necessarily young or attractive, it practically does not stand out, being often the passenger of the motorcyclist. The woman's interaction with the motorcycle is mediated by the man, outlining a relationship of gender subordination. The third classification is "solo rider" which embodies a single woman on a motorcycle, the first time when there is a direct contact between them. An interesting aspect to mention is the degree of independence of the motorcyclist, who becomes responsible for her motorcycle and has the opportunity to choose her own destination. However, the physical portrait offers some clues to a relationship of subordination to the male gender: the woman is white, middle class, young, attractive, and her attire is marked by skimpy clothes, tight on the body to highlight body shapes. At the same time, the image is completed by makeup, hairstyle and accessories that are not suitable for riding a motorcycle. Thus, the appearance of "solo rider" female motorcyclist inspires sexual availability and openness to male domination, which suggests the true purpose of these publications: to stimulate the idea of the woman as a sexual object. A first conclusion regarding the research conducted by Buchan Jennifer is that the trend of motorcycle magazines between 1937 and 2011 was aimed at perpetuating the vision of the hierarchical relationship between women and men, whether women are alone or accompanied by a motorcycle.

The concept of "solo rider" women also appears in the book of anthropologist Barbara Joans "Bike Lust: Harleys, Women, and the American Society" (2001), based on an analysis of the American women motorcyclists as a subculture. Starting from the assessment of her own evolution from passenger to motorcycle owner, Barbara Joans (2001: 145) argues that riding a motorcycle contributes to redefining masculinity and femininity. Men are considered to be strong and action-oriented, while women are perceived as sensitive and protective. Thus, riding a motorcycle contributes to the exaggeration of gender for men by emphasizing an aggressive, dominant image, while women motorcyclists seem to deny their gender characteristics. Therefore, Barbara Joans argues that for society, the "solo rider" is perceived as a traitor of her kind. This statement starts from the representation of feminism with a negative connotation,

through which the woman is a small being, passive, submissive, subordinate, vulnerable and without self-confidence. After all, all these features are contrary to riding a motorcycle. Research goes further and looks at how women motorcyclists define femininity (Joans, 2001: 150). The merit of the author's scientific approach is to highlight the fact that femininity breaks down the barriers of concept, a pattern in which women must fit, but rather femininity is given by the way women feel. In the world of women motorcyclists, gender is redefined, so that femininity is interpreted as a force meant to allow the best feelings to come out (ibid). This reconstruction of femininity can also mean that masculinity evolves from the strict concept stage, in the end the goal being to blur the barrier between masculinity and femininity. People will no longer feel compelled to identify with masculinity and femininity because gender becomes a complex social structure, by generating multiple femininities and masculinities (Bugdeon, 2014: 324).

The role of women in the world of motorcycles has undergone an important evolution, starting from the universe in which the man is the center, and the woman and the motorcycle serve the purpose of objects that permanently confirm their masculinity and to establish a direct relationship between women and motorcycles. Therefore, it can be considered that we are witnessing a process of personification of women in the world of motorcycles, which assumes the social role of motorcyclist. Thus, the woman at the helm of the motorcycle describes a new topic worthy of research in the social sciences: femininity and its complexity in the world of motorcycles. A first step in deepening this topic is to explore how the passion for motorcycles is born in women, which represents the objective of the next section.

### **3. What stands between a woman and a motorcycle?**

Starting from Jderu Gabriel's approach (2014) according to which becoming a motorcyclist can be perceived as a social career, this section follows the path of a woman in becoming a motorcyclist. Thus, the universe of motorcycling becomes a space for the manifestations of stereotypes and gender inequalities, a fertile ground for further sociological studies. The importance of this research is emphasized by Jderu (2014: 4) according to which "the study of the social career of the motorcyclist involves the analysis of the social process of voluntarily changing his social identity, the transformations that an individual experiences in contact with the symbolic universe of the motorcycle world".

Carol J. Auster (2001) discusses in the article "Transcending Potential Antecedent Leisure Constraints: The Case of Women Motorcycle Operators" how women become passionate about motorcycling. The study was addressed to women aged 16 to 79, the sample being organized into four demographic groups: women under 30, 30-39, 40-54 and over 50 years (Auster, 2001: 283). The purpose of these distribution was to illustrate the differences in mentality between generations regarding riding a motorcycle as an exclusive male activity. Auster (2001) identifies as women's motivations for riding a motorcycle the feelings of freedom and independence, communion with nature, pleasure and fun, family and spending time with friends and meeting new people (2001: 284). According to this research, the birth of the passion for riding a motorcycle starts from being a passenger, knowing people who own a motorcycle or taking over and learning to ride a motorcycle from a family member. The overview of women motorcyclists is complemented by Francis D. Glamser's (2003) study, "Women Motorcyclists: Childhood Foundations and Adult Pathways" which assumes that women's passion for motorcycles can be explained by certain inclinations or behaviours in childhood. Thus, following a survey with a sample aged between 20 and 55 years, the results showed that, in the first instance, most respondents showed interest and practiced outdoor sports in childhood (Glamser, 2003: 186). Secondly, another peculiarity of the women participating in the study was their involvement in games specific to boys. Last but not least, their parents adopted a gender-neutral style of education (ibid: 187), namely, the tasks and responsibilities assigned to the children were the same, even if they were girls or boys. These three categories give the

motorcycle the following meaning: a way of spending time outdoors, free from the bias that it is a universe suitable for men only.

In the article "Girl Power and Participation in Macho Recreation: The Case of Female Harley Riders", Catherine A. Roster (2007) conducted a research on how women make way in a male-dominated activity as riding a motorcycle. Starting from the premise that through the motorcycle, women redefine femininity by highlighting its positive elements and limiting stereotypes, Roster (2007) identifies a number of issues that underlie women's motivation to enter the world of motorcycles. According to interviews applied to women motorcyclists (Roster, 2007: 450), riding a motorcycle becomes a form of therapy, through which the accumulated stress is released. After all, it represents a leisure activity, a way of freeing themselves from the daily obligations of family and work. It is also interesting to note that women tend to want to travel alone, so as not to be distracted by their companions. Furthermore, we identify the theme of the communion with nature, which can contribute to increasing the feeling of independence (ibid). Another element worth analysing regarding women's motorcycling careers is the moment that triggers or determines the desire to ride a motorcycle. According to his research, Roster (2007: 450-451) states that the orientation towards motorcycles can coincide with experiencing a transition in life, whether it is a divorce or the loss of a loved one. The feelings of regaining control, but also the freedom offered by motorcycle getaways contribute to overcoming difficult moments.

Comparing the three researches of sociologists Carol J. Auster (2001), Francis D. Glamser (2003) and Catherine A. Roster (2007), it can be stated that the birth of the passion for motorcycles in the family can have two dimensions: first, a positive side, the learning process as a result of getting acquainted with the motorcycle of a family member, but also a negative part, generated by a breakup or the loss of a loved one. Regardless of the element that triggered this passion, the motorcycle represents an universe of freedom and independence, through which the woman can build her own identity, independent to her other social roles: mother and wife. In fact, it can be considered that the motorcycle world contributes to the construction of another social role, but without completely excluding the other two. On the other hand, taking into account the research of Francis D. Glamser (2003), the decision to ride a motorcycle is based on an intrinsic motivation, a desire associated with the way a woman is. After all, this perspective directly connects the motorcycle universe with certain features of the woman that lead her to follow this path, unlike the other two studies that refer only to external factors. Another conclusion regarding the portrayal of the motorcyclist in this article is that the family and childhood contributed to the creation of a gender-neutral way of thinking. The lack of this barrier leads, in fact, to the confidence of a woman's own strength, who has the courage to do anything, without the imprint of gender.

Concerning the female motorcyclist as a part of a social group, Aiwa Romy and Mayukh Dewan (2021) propose in the article "The Bikerni: an ethnographic study on women motorcyclists in modern India" a gender-neutral view of the Bikerni Indian Motorcycle Club. Therefore, following an anthropological research conducted within the women's biker club called Bikerni, sociologists identify the main theme of the group: women's emancipation (2020: 10). This concept can be understood in terms of an inspirational message that any women can ride a motorcycle. Hence, a first conclusion of the study is that a women's motorcycle club does not necessarily crystallize only on the basis of rebellion against men or the whole world. Female motorcyclists tend to associate in a group to enjoy together the benefits of riding a motorcycle: communion with nature, revitalization, spending free time. In support of this statement, Aiwa Romy and Mayukh Dewan (2021: 10-11) divide Bikerni club members into three categories: women who enjoy riding motorcycle as a leisure activity, attractive women eager to participate in many parties, and the ones with the longest membership, concerned with the organization of the club. Overall, regardless of each category, their general tendency was to enjoy club membership by spending free time on a motorcycle together, showing concern for group involvement and supporting its development. In fact, the article proposes the perspective that

riding a motorcycle symbolizes recreation, freedom and independence, regardless of sex or gender. Owning a motorcycle in order to take long distance trips, in a group or not, brings satisfaction whether we are talking about men or women.

However, women's passion for motorcycles can also be hindered or prejudiced by general perception of gender in the social environment. In the article "Playing with the Guys: Women's Negotiations of Gendered Leisure and Space", Patricia Gagne and D. Mark Austin (2010) women's passion for motorcycling tends to become a process by which they "negotiate" gender in recreational activities considered exclusively male. Thus, the research identifies the difficulties and obstacles that women face to ride a motorcycle. A first feeling that influenced the decision of women to pursue their passion was the fact that they did not feel able to take part in activities that involve costs, time and risks. The main reason was that they tried to sacrifice themselves for those around them and any personal goal led to a sense of guilt. Thereby, some of the respondents in the research argued that they started riding a motorcycle after a divorce or after raising children. Patriarchal control has also contributed to women's efforts to ride motorcycles. Specifically, resistance from husbands, parents, and loved ones had an impact on women who were also mothers, the main reason being that this hobby is dangerous and risky and that children may become orphans. At the same time, the display of women motorcyclists in public places carries a number of risks: a woman shouldn't ride a motorcycle alone on road because she may be exposed to danger. Most of the time, these two aspects were translated by the fact that a woman must know "her place" and respect it. Last but not least, each woman's inner fears acted in the same way as limitations on the risks involved and riding a motorcycle without companions. A possible cause of these personal restraints may come as a permanent underestimation of others and a combination of the above mentioned obstacles.

In conclusion, women's passion for riding a motorcycle becomes an expression of freedom, of the need for communion with nature, translated into a way of spending free time alone or in the company of others. On the other hand, riding a motorcycle contributes to a redefinition of the social roles in the life of a woman, who can also be a wife or a mother.

#### **4. Conclusions**

In this article, I set out to understand and deepen the role of women in the world of motorcycles, a universe considered exclusively male. From the very beginning, the motorcycle was both a means of transportation and an extension of masculinity, being often associated with the image of rebellious men, eager to be free and to live beyond the norms of society. Once this social perception was built, the place of women in this world became inappropriate, opposing the values and roles they embody, from a gender perspective. This theory is confirmed by the study of Jennifer Buchan (2013) who discusses the presence of the woman with the man motorcyclist only as an accessory, being often exploited as the image of an attractive young woman, eager for adventure and fun. In this trio, motorcycle-man-woman, the man is at the center of the universe, at the handlebars, and the woman, sometimes, the passenger. Magazines and publications dedicated to motorcyclists joined the woman and the motorcycle in the same photo just to attract men. There may be two possible explanations for this approach: first, the publications were exclusively for men, with this gender limitation in the men's world, and the number of women riding motorcycles was small. The passive role in the relationship with the motorcycle is also suggested by the position of "ol' lady", in which the woman is the partner of a motorcyclist who may belong to a motorcycle club. In this case, women were considered objects, often sexual, which bring income to the partner dedicated to the cause of the club. Within the motorcycle groups, women can also have the status of occasional partners of several members of the club, highlighting again the fact that they brought only material or physical benefits to men. The third social representation, "solo rider" marks the appearance of the woman in direct contact with the motorcycle, on her handlebars. Therefore, for the first time,

the personification of the woman in relation to the motorcycle appears where she is assuming the social role of motorcyclist, having the freedom and independence to follow her own path.

It is also interesting to note and analyse how the gender and social roles of women influence both the social perception and their desire to develop a passion for riding a motorcycle. In some cases, the first contact with the motorcycle is made through a close person who owns a motorcycle or by starting from the passenger position. Social prejudices and stereotypes exploit an image of the woman who needs protection and who has to know her “place” in social groups: mother, wife, away from risks. Women often become motorcyclists once their children have grown up and become mothers, after a loved one has died or divorced. The release of the roles mentioned earlier may lead to the opportunity to have a new passion: riding a motorcycle.

The evolution of the relationship between women and motorcycles highlights transformations of the world of motorcycling, which until recently was considered exclusively male. Thus, the blurring of gender barriers in motorcycling contributes to the emergence of a new field of research that deserves attention: femininity at the helm of the motorcycle. Future research directions can look at how the gender of women motorcyclists is displayed and how it shapes motorcycling, whether we are talking about the activity itself, the social groups that crystallize around it or equipment, driving in traffic and the perception of risk.

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# THE CHALLENGES OF EDUCATION IN THE ERA OF DIGITAL TECHNOLOGY

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**Abstract:** *The contemporary world sometimes seems to be a world of permanent transition. It appears to us at the same time unitary (due to the accentuation of the similarities that occurred through globalization) but also diverse (due to the different ways of achieving the transformations determined by the global changes of the world). Today's social world is an exponentially developed world of globalization and technology and information. Social relationships can be seen as local, but they are influenced by global events that are instantly known around the world due to real-time virtual communication. Thus, the relationships and influences between people expand and include people and communities distant in the physical space, but not socially virtual, these being a click away. Today's society has reached such a level of development in most areas of social life that we have to manage the consequences in these areas, namely in education, culture, economy, strongly influenced by information and communication technology. Contemporary societies are in a profound period of change, the development of technology, the Covid-19 pandemic have had a profound effect on education and its consequences are unforeseen. Educational differences and inequality are found in all societies where competition, markets and the family are central institutions. The school is one of the institutions that plays an essential role in society. In this context, it is necessary to mention some of the challenges of education over time and those it has today, in the context of society influenced by technological development and the pandemic context caused by the Sars Cov virus 2. Although initially education was supposed to be a means of reducing social inequalities, the reality is much more complex and paradoxically education sometimes tends to express inequalities to a greater extent than it does to change them. How education actually produces educational inequalities is a reality in the context of today's society strongly marked by the development of technology and the crisis caused by the Covid-19 pandemic.*

**Keywords:** *education; school as an organization; stratification and social mobility; technology; social inequalities*

## **1. The scientific context from a sociological point of view in which we can talk about education**

In the form of what we understand most, education, perceived as a process of instruction in a school setting, has emerged with the spread of printed materials and the increase in literacy. Thus, in many places, knowledge could be transmitted, retained and reproduced by as many people as possible. The sociological context in which we can talk about education is that of the sociology of education.

In "Sociology of Education" Adrian Hatos (2006) reviews the historical landmarks related to the evolution of education. Mass education became a global institution in the post-war period, both as a political principle and as an organizational reality. The development of modern education is linked to the introduction of the classical Latin curriculum of the Renaissance, the introduction of the printing press, the Protestant Reformation and the spread of religious schools. The institutional initiatives of some Western European countries (France, Germany) have determined the current form of public education systems, a similar evolution being for the Romanian education system. The post-war period is marked by the concern of governments and international organizations for the development of an educational offer and for school results. The model of mass education appears, which can be explained on the basis of

demographic factors (demographic explosion) and political-institutional factors (the spread of the model of organization of the nation-state) (2006: 27-36).

Industrialization has led to the specialization of labor, and the spread of knowledge has acquired a much more abstract than practical character - the skills of reading, writing, counting. Contemporary education systems can be described by the degree of decision-making centralization (the existence of a central authority, ministry type) and the structure of school careers (vocational, vocational oriented, analyzing the relationship between vocational training and labor market position, the number of graduates who university studies). The expansion of education in the twentieth century has been linked to the need for a literate and disciplined workforce. Although education was originally supposed to be a means of reducing social inequalities, the reality is much more complex and paradoxically education sometimes tends to express inequalities to a greater extent than it does to change them.

Regarding the definition of sociology of education F. Znaniecki (1980) defines as the scientific study of educational practices in different societies. Educational practices refer to the preparation of the young generation by previous generations to actively participate in the culture of the society to which they belong. The autonomy of educational systems requires the existence of a separate scientific discipline that analyzes the mechanisms of operation of schools, school efficiency, evaluation of school activity, teacher training, their educational practices, the effects of educational activity on students, the effect that school results have on social mobility. how education participates in the production of social stratification (1975: 53-62).

The fact that society is organized systemically, organically is an idea of modern social thinking, in which different components fulfill certain functions, satisfy certain needs. The explanatory sociological paradigm for school is functionalism, by referring to concepts such as function / dysfunction or latent functions / manifest functions (RK Merton, 1968: 73-136).

The school, as a social institution, from the perspective of the sociology of education is approached from a functionalist point of view, having defined functions within the social ensemble. Social institutions represent a system of social relations organized on the basis of common values and in which certain procedures are used in order to satisfy certain fundamental social needs of society (Mihăilescu, 2003: 175).

Social organization is defined as a system of social roles and institutions, behavioral patterns, means of action and social control that ensures the needs of a community, coordinates the actions of its members, regulates relations between them and ensures the stability and cohesion of the group. From a sociological perspective, the main elements of social organization are: social roles and statuses, behavioral models, means of action, social institutions, social organizations and social control (Mihăilescu, 2003: 185-187).

As a social organization, the institution of the school can be analyzed from the perspective of the structure it has, the functioning process, the relations it develops with the external environment, the functions it fulfills, the rules that guide it. Thus, the school has a formal structure, the school transmits values and social models, including school classes, teachers, hierarchy of competence. As a process of functioning in the school there are relations between the members of the organization (students, teachers). The school is a system, and the school class can be considered a subsystem. Characteristic of the subsystem is that it reproduces the features of the whole (system). The psychosocial life of each class, the relationships between classes reflect the characteristics of the organizational climate. The school is not isolated, it develops multiple relationships with the socio-economic environment: with the family, the media, cultural institutions, politics. As an organization, it fulfills two functions: the primary function, school offers educational services (to students) and products (to society) and the secondary function, school offers attitudinal, behavioral models, moral norms to the community it serves. The school is an open system that is marked by multiple transformations, which come from both inside and outside the system and presents a system of rules, codes, regulations that transform it, from the perspective of subjecting the members of the organization to them, in a

bureaucratic organization. The people who work in the school organization (students, teachers) relate to the educational requirements and are participants in the development of the organization. School is a formal system (prescribing rules and regulations, sanctioning the behavior of individuals) and an environment in which informal interpersonal relationships develop (sympathy, antipathy, choice and rejection). Sometimes informal relationships can be formalized and form specific codes and rules of conduct.

All these characteristics represent the school as an organization, as a complex system of psychological and social influences and interactions, which is closely related to the values of society, and the behavior of individuals (students, teachers) is a result of various influences, formal and informal, in which they actively participate. The school is in the middle of a series of challenges today, being influenced by economic progress, technological development.

In this context, it should be noted that there are a number of approaches, debates about the functions of the school and the changes that the education system is going through. In a democratic society, schools are organized according to the functions they perform. One of them is the integrative function of the school, it must help the integration of young people in adult, occupational, political, professional roles required by the economy and the stable political system. Another function is the function of equal opportunities: the school is necessary to ensure fair competition for social roles, given that there are inequalities in society in terms of economic and social status. The development function must also be emphasized: the school must ensure the personal development of individuals (in terms of mental and moral development). It is appreciated that the three functions are compatible and mutually supportive. In a capitalist economy, individuals who have a high level of personal development can play higher-ranking occupational roles in the social hierarchy. In other words, personal development is economically productive. School in a democratic system can provide opportunities for personal development, regardless of race, gender, or social class (Dewey, 1966: 20-88).

Although it received a number of criticisms, through the concepts introduced and the explanatory model offered regarding the functioning of the school, the functionalist explanatory paradigm, taking into account the economic and technological progress in Western countries, produced confidence in the democratization of society, non-discriminatory access of people to the exercise of rights, equal opportunities and the development of individuals.

Society is a set of positions that fulfill certain functions. The proper functioning of the social system is ensured if the needs are met: the members of the society are distributed in social (professional) positions and fulfill their corresponding obligations. Thus, in relation to the social system and social stratification, the school fulfills the following functions such as: transmitting the knowledge necessary to occupy certain social positions, through selection and evaluation mechanisms, the school contributes to the occupation of social positions by individuals, the school transmits a system of values determining a hierarchy of social positions (Davis & Moore, 1945: 242-249).

The analysis of the specialized literature shows that sociology, in this case the sociology of education, refers to functionalist approaches. Thus, the conclusion regarding the functions of education today, from a functionalist perspective, would be that these are manifest functions and latent functions. Through its manifest functions, the school contributes to the transmission of the forms of individuals, knowledge the allocation of the status of individuals in the hierarchy of society, to the common cultural socialization of individuals as a tool to maintain social cohesion, while supporting economic growth by providing skilled work and individual development of the beneficiaries of education. Through the latent functions of the school, it transmits the dominant culture of the society, maintains the social control, ensuring the socialization of the students with the rules of the society, together with the family. Thus, education is an agent of change in society, its acceptance by individuals or their contribution to change, innovation (Voicu, 2003: 567-584).

There were subsequent debates and assessments regarding these functions of the school, and an analysis of the contents of education, both in Romania and in other countries highlights intense debates that support the idea of education as a process, and in the functioning of the school as an institution we find a series of challenges.

## **2. Does education produce educational inequalities?**

Any society is a group of individuals belonging to the same species and are organized to communicate, to cooperate in a given space or territory to achieve individual or collective goods. Society represents a system of relations between individual and social actors that compose it, these being conditioned by resources, by the way they have access to resources and the culture constituted in the historical time (Vlăsceanu, 2011: 88-89).

Social order and dynamics are central concepts in sociology. The social order refers to the relatively stable way of organizing a society, while the dynamics aim at the transition through social changes, from one type to another of social order. From a historical point of view, societies differ according to the way the social order is configured, the way economic, political, cultural, religious, military activities are organized, including the ways in which knowledge and practical experiences are transmitted through education. From one generation to the next. The modern social order is industrial in economic and capitalist production in distribution, accumulation and consumption, it is democratic in political organization, respect for human rights and freedoms, innovation in culture, free participation in organizations. Stratification is a record of the functioning of society. All societies, including modern society, are stratified and marked by social inequalities. The way in which individuals position and move in the social hierarchy and the way in which social inequalities are generated is related to the concepts of stratification and social mobility. The analysis of the literature highlights that, although each society can be characterized by stratification and mobility regimes with special particularities, there are certain common elements in the stratification of societies determined by the way they are organized. The basic elements of the social structure that create the context of social stratification and mobility are social status, social roles, groups, organizations, institutions. The school being one of the important institutions, component of the social structure, with multiple functions in occupying social statuses and exercising social roles in society, contributes to social stratification and mobility. Sociologists approach social stratification in terms of social classes and social strata. In the case of social mobility, the idea of the movements that take place within the social hierarchy within the social space is approached. In the case of the status achievement model, the links between the social origins of individuals (education, occupation, parents' income) and the social destinations of individuals, level of education, occupational status, income are described (Vlăsceanu, 2011: 299-313).

Taking into consideration that one of the functions of the school is the allocation of status to individuals, one of the challenges is the model of achieving status through the use of the education system. Does it contribute to the achievement of status or does this aspect in itself determine social inequality?

Education, through its organization, through its functions is one of the most important areas of society. It reproduces the culture of a society in the attitude and behavior of individuals in society in the process of socialization. At the same time, it intersects with the economy and all areas of a society, having an impact on social stratification.

Learning as a process can be planned, organized, or implicit and unplanned. The pedagogical literature defines three types of education: formal, non-formal and informal. Formal education refers to the totality of intentional and systematic influences, realized within specialized institutions (school, university) in order to form the human personality. Education and training are planned on the basis of clearly formulated objectives, the aim being to introduce individuals to the paradigms of knowledge and culture of society. The training is done consciously and planned, by a body groups of trained specialists. This type of education allows a systematized assimilation of knowledge and contributes to the formation of skills, abilities

and attitudes necessary for the integration of the individual in society and is related to a public education policy (Cucoş, 2014: 59). Non-formal education includes all the educational influences that take place outside the classroom, through extracurricular activities, less formalized, but with formative effects (Cozma, 1988: 50). Informal education includes all unintentional, diffuse, heterogeneous information that is not selected, organized and processed from a pedagogical point of view, and the learning initiative belongs to the individual (Cucoş, 2014: 54). Of the three types of education, the formal one is the one that, in the context of the organization of the modern society, is carried out under the control of the state that manages the contents, human and material resources.

We are in that stage of development of the modern society in which it is necessary to manage its social, cultural, economic consequences, including for the education system. The growing division of labor in the face of technological progress calls for a school to cope with these changes in society.

Education itself is beneficial to the individual and to society, yet it presents a number of contradictions and inequalities. That is why the field of discussion between the relationship between school and social inequalities appears. Equal opportunities mean that the occupation of social positions is made competitive, with participation being guaranteed to all members of society, while inequality refers to the limitation of access to competition for status according to certain initial characteristics. Thus, equal opportunities for education refer to a meritocratic mechanism for obtaining school results, which rewards skill and effort. Inequality of opportunity can be formal, in cases of explicit discrimination (for example in situations of limiting the number of places in schools according to ethnicity or race) or substantial, in cases where the resources required to participate in the competition for status are unevenly distributed. , and access to positions, although not formally restricted, is difficult without resources. An example is the access to education of Roma who are formally guaranteed equal educational opportunities, but due to social and cultural deficiencies, the probability of their educational and social achievement is very limited. Equal opportunities can be a reality with the removal of class barriers to access to education and the democratization of education (Vlăsceanu, 2011: 606-610).

The sociological study of education reflects at least two themes: the relationship between school and social stratification and the social sources of school achievement (Hatos, 2006: 109-120). After the Second World War, sociologists were concerned with analyzing the relationship between school and society in two categories: school inequalities are created by social, institutional or individual mechanisms and the effects of education on socioeconomic status. They analyzed the disparities in the probability of access to education from different social groups (ethnic, racial, geographical, cultural, especially socio-economic).

Inequality in access to education has been established as an indisputable statistical fact. The increase in social inequalities with each stage of education is explained by the aggregation of individual investment decisions in education, decisions determined by family resources and the subjective use of diplomas obtained. The unequal distribution of resources leads to the calculation of different utility in terms of investment in education. School systems tend to change independently of occupational systems. Strong school mobility is not related to social mobility in the same sense (Anderson, 1961: 560-570). School mobility is not a guarantee of social mobility and therefore the school does not play a role in increasing social mobility and democratizing society. Thus, different theories appear about the expansion of the archived school systems , the use of diplomas on the labor market and the sources of educational inequalities.

The issue of education and the important role that school systems play in the mechanisms of social mobility, either stimulating access to social positions or restricting it are issues addressed by Raymond Boudon. Thus, social mobility can be defined as the result of a selection of individuals following the influence of family, school, church, bureaucracy. They can

influence the position of individuals both individually and socially. The school is one of the institutions that contributes to the ranking of individuals (Boudon, 1997: 191-201).

Relevant in the context of the discussion about the role of school in achieving school equality or inequality is the study conducted by James Coleman in 1966 (Hatos, 2006: 125). In the political and cultural context of the growing concern for the issue of civil rights and racial equality, was this reference research conducted. The US Congress has called for an inquiry into the lack of equal educational opportunities for race, skin color, religion or national origin in public schools at all levels in the United States. As a result of the study conducted on a sample of 645,000 students from different cycles of education in 4,000 schools, a number of conclusions were drawn. There are important inequalities of access for children from different social classes, children from working-class families or farmers are less likely to have access than those from more advantaged categories to enter different levels of education. Inequalities in access worsen over the life of individuals (they increase with the rise in the educational hierarchy).

Inequalities in student performance result mainly from social and family differences than from material and pedagogical disparities between schools. Inequalities in the school field depend, statistically, more on the social background of children than on the results of intelligence tests, while the income variable is less important than the cultural variables. School aspirations are differentiated by social class, with working-class parents sometimes having lower school expectations. Teachers consciously or unconsciously take into account the social background of students when doing school orientation, with students in lower status receiving less ambitious recommendations than those in the middle class. School expenses, equipment and school curricula matter less than the social composition of the schools (the characteristics of the teaching staff, the group of colleagues at school). It can thus be appreciated that the differences in the school results of a school are only to a small extent determined by its school characteristics. Therefore, the solution of equal opportunities does not consist both in equalizing school opportunities and in equalizing students, and solutions that are based on increasing investment in poor schools do not make a significant contribution to increasing the school opportunities of students included in them. School results are most strongly influenced by the characteristics of the family environment and the level of education of the parents.

The study had a long-term impact on the educational policy of US governments, and its findings were reconfirmed by further research with the same objectives. Thus, measures were introduced to integrate schools and eradicate segregation caused by the ethnic, racial and social composition of neighborhoods.

50 years after the Coleman report, there is still no consensus on the relationship between schools and inequality, schools have different ways of providing learning for disadvantaged children, compared to the least disadvantaged. Thus the roles of the school would be neutral, without contributions in the production of inequalities, exacerbating, the inequalities would become serious and compensatory, the schools would actually reduce the inequalities. Regarding the compensatory roles of the school in reproducing social inequalities, there are a number of factors outside the education system that indirectly influence schools: health care for children, parental income inequality, family structure, housing, racial and ethnic inequality, emigrant status. Factors related to the activity that takes place inside the schools refer to funding, unequal distribution of competent teachers (qualified, unqualified, distribution in rural, urban), curriculum that is applied differently, although the rules are of uniform application, stimulating learning environment or less stimulating, residential segregation, relationship with family, parents, community (Downey, 2016: 201-220).

To these are added the challenges of contemporary society from a digital perspective called the information and knowledge society, the increasingly sophisticated development of computers, their interconnection through communication networks, the Internet and an extreme phenomenon that has affected humanity, the pandemic generated of COVID-19 virus infection. Access to technology does not in itself mean skills in its use, better school results, equal access to education and equal opportunities in education.

Thus, it can be concluded that the social inequality that schools determine, inequality in student performance results from social and family differences rather than material and pedagogical disparities between schools, the challenges of contemporary society from a digital perspective, the pandemic generated COVID-19 virus infection, and differences between schools matter too little in determining school performance.

### **3. Education in the age of digital technology**

The world we live in is constantly changing. The unprecedented development of communication and information technology, progress towards the information society and knowledge have led to changes in people's lives. Technology has become part of our existence, influencing areas of social life, including education. The new digital age is bringing a new kind of approach to the educational phenomenon through new communication and information technologies. The analysis of virtual, online educational processes leads us to the conclusion that there is a new perspective on approaching the educational process in today's society, a perspective that faces a number of challenges in the aforementioned context of social inequalities that schools can cause.

Most sociological analyzes of social stratification separate social inequalities from technical processes (Hatford, 2010: 937-955). However, digital and communication technologies are involved in social inequality (in the classical approaches associated with social class, gender, race). The "digital divide" is also defined, it refers to the separation of technology, on the one hand from the social process of social inequality, on the other. There is also the notion of "digital divide" which refers to those who have skills and those who do not, so there is the possibility of more complex stratification processes.

Internet access is differentiated, both individually and between countries. Not all people have access to the internet and this is associated with inequalities in age, gender, income, social class, race. Thus, people can become subject to social exclusion because they cannot access the labor market, health care, social assistance, consumption, political involvement and thus have very different chances at different opportunities. At the same time, this reality is complemented by the idea that access itself does not only provide benefits to users. Does digital inequality refer to the way in which individuals have access to information and communication technology, and if they have access to know how to use technology, do they have digital skills, do they influence their social status?

All these challenges can be analyzed at the level of the education system from the perspective of potential inequalities in the education system : students '/ teachers' access to digital infrastructure (PC, laptop, tablet, smartphone), the Internet is differentiated according to age criteria, socio-cultural background, family income, ethnicity), even if they have devices and access this does not mean that they know how to use them, that they have developed digital skills by themselves, those aspects are extremely unequal for both students and teachers, in the same time with the level of digital and communication infrastructure of schools.

In 2021, the OECD (Organization for Economic Co-operation and Development) produced a report on the state of education in the pandemic year, the conclusions of which can be used in new ways to adapt education to the contemporary context. The crisis has highlighted the many inadequacies and inequities in school systems - from internet access and the provision of computers for online education, through the means of support needed to achieve learning, to the failure to align resources with needs. But, as these inequities are amplified in this time of crisis, the possibility of not returning to the pre-pandemic state can be maintained when things return to normal due to resistance to change. Following this period, it is necessary to formulate collective and systemic answers to the way in which people are affected by different situations, sometimes by crisis. In an unprecedented crisis like this pandemic, some of the good educational practices of the past could no longer be used. Pandemic education highlighted a range of issues ranging from lost learning opportunities and access reduction strategies, through the organization of learning and working conditions of teachers, to the problems of



governments funding those who did not have devices and not have access to the internet (students, teachers). This crisis may have amplified inequalities within countries, but it is likely to have amplified differences in performance between countries. During the school's closure, digital resources became the lifeline for education, and the pandemic forced teachers and students to adapt quickly to online teaching and learning. Virtually all countries have rapidly seen improved e-learning opportunities for both students and teachers, and it has encouraged new forms of teacher collaboration. Online platforms have been widely used at all levels of education. The infrastructure used by those involved was: mobile phones, tablets, laptops, PCs, in some cases television. The opportunities offered by digital technologies have shown that there was no one-size-fits-all solution during the pandemic. Digital technology allows us to find completely new answers to what people are learning, how people are learning, where people are learning and when they are learning. It can change the role of teachers from knowledge transmission, to collaborative teaching-learning-assessment, using different digital tools, being able to become knowledge creators, through the inter and transdisciplinary approach, mentors for their students. The digital context can be a solution to adapt learning to suit personal learning styles, with much greater accuracy than the traditional classical approach can. Similarly, the virtual learning environment can provide students with an opportunity to design, lead, and learn from experiments, rather than learning about them.

However, although the crisis was an opportunity, at the same time many educational systems proved to be unprepared, and research has shown major limitations in access for students and teachers, different quality of educational activities, equity and differentiated use of digital resources in learning and teaching by students and teachers. The use of lessons learned during the pandemic will perhaps be a solution to adapt education systems to the current needs of students, reduce educational inequalities, as well as the new social context, including the economic one. Going beyond the pandemic, it is important to capitalize on how distance learning solutions meet the needs of students and how they can use their quality learning opportunities in real-life contexts.

According to the 2021 report of the EC (European Commission) it highlighted a number of conclusions, including the fact that this crisis we are going through has shown that online educational resources and digital learning platforms can be used to reconfigure learning environments, in order to educate students for their future, not for the past. There is also a need for an online and distance learning infrastructure, as well as the development of digital skills for students and teachers to learn in this way. But beyond the pandemic, there are benefits for students in extending their learning time and learning opportunities beyond the physical walls of the school, by being able to learn other than traditionally, using a variety of ways of distance learning. It is also worth noting that the transition to distance learning has had a profound impact on the work of teachers. The crisis has forced many of them to acquire new digital skills and competences, to prepare lessons appropriate to virtual learning environments, to add new responsibilities in their work, to assist and coordinate support and resources for their students, to increase interaction with parents, organizing remedial activities or implementing new administrative, health and safety procedures in schools. In a way, the crisis has also revealed the enormous potential for innovation that exists latent in education systems, which often remain dependent on traditional practices, dominated by hierarchical structures oriented towards reward, towards conformity. The lessons learned during this period can be exploited and thus innovation can be achieved in schools, by encouraging the autonomy acquired by students and teachers and the collaborative culture developed using the online environment. In order to mobilize support for innovation, to cope with resistance to change, especially in the context of the uncertainty created by the pandemic, education systems need to become more effective in adapting to the needs of change and building support for change for all involved. Investing in digital infrastructure, developing digital skills for students and teachers and change management skills will be essential for the future. It is vital that teachers become active agents for change, not only in the technological and educational implementation of technological and



communication innovations, but also in contributing to the reduction of educational inequalities.

New educational strategies, which can be inspired by the lessons learned during the pandemic, by the methods of non-formal education, can be developed based on the use of the Internet and mobile devices. Also, many of the educational activities that teachers are used to can be adapted by taking into account the digital world. By accepting the role of learning facilitator, teachers can also help students develop digital skills, autonomous learning skills, and critical understanding and thinking. If education becomes more effective and meaningful when it takes into account real life and the elements of reality that are familiar to students, it means that education should also take into account online reality. If the educational process is perceived as focused on something other than the accumulation of pre-established knowledge, on developing skills and supporting students to build their own understanding of the world, they should explicitly refer to their life experiences. Thus, teachers need to bring the learning process closer to the real life of children and young people, thus incorporating aspects related to their experiences in the digital world. The educational process should appreciate and use the skills acquired by children and young people through informal learning in the online environment or by participating in non-formal educational activities related to ICT. Young people are becoming more and more accustomed to learning by exploring a new tool or using various online tutorials. This is in fact evidence of autonomous learning skills and should be recognized and encouraged in the school context, along with critical thinking skills to develop the ability to identify reliable and valid sources of learning.

The evolution of the teaching tools used in schools has seen a spectacular leap in this period. Although still a novelty for teachers, they are familiar and often used by students. Of course, classical learning methods should not be removed from the learning process, but students and teachers need modern learning tools, such as those used in their spare time. Modern technology can be seen as a complement to education and not as a negative factor. Digital equipment has already proven its effectiveness as a teaching and learning method. Working with modern digital equipment is a challenge for teachers, but many of them access and use it in class, adapting their classic lessons to the digital environment.

### **Conclusions**

Adoption and effective integration of ICT in schools are extremely uneven processes, although the need for effective inclusion of technology in schools is a necessity (even more so in a pandemic context). The inertia of educational systems, the resistance to change of teachers, the lack of awareness of including the benefits of integrating digital tools in teaching-learning-assessment contribute to an inadequacy of school functions from the real needs of students and good school results, influence inequalities in the education system.

As modern technologies produce new global trends in education, social life is being digitized, educational perspectives are being redesigned and new opportunities assessments are needed. Innovative education should respond to current global challenges. In the new information age, educational technologies should be a common education strategy. There is a need to develop ICT skills in education systems and to create a new educational environment that offers lifelong learning opportunities which alleviate social inequalities.

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# THE CURRENT SITUATION OF MACEDONIANS IN ROMANIA

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**Abstract:** *The article is based on a series of official statistical data, which gives us a unified image of the Macedonian minority in Romania, especially in the Oltenia region. The statistical data have been correlated and evaluated against the objectives and purpose of the Article. The data came from analyzes based on significant indicators for the knowledge of Macedonian minority communities in Romanian historical, geographical and cultural space. The data reproduction was carried out following the analysis of the population and housing census results carried out by the National Statistics Institute of Romania in 2011, but data were published in 2014.*

**Keywords:** *ethnicity, identity, Macedonians, ethnic distribution, status.*

## 1. Introduction

First of all, the term to be defined is ethnicity, etymological it comes from the Enos Greek, which designates a community of the same origin and common ancestors, and which is different from the tribesman, smaller in size. So by ethnicity, we understand the group of individuals who have the same origin. Data on the Macedonian ethnicity of the census was conducted by centralizing the significant statistical information summed at the city level municipality, city, commune, for all the sectors listed.

In the October 2011 census, the registration of ethnicity was made based on statements by individuals, respecting the right of each individual to recognize their ethnic affiliation.

## 2. Ethnic composition at the national, regional, and county level

The population census results show that of the total population 88,6 percent declared themselves Romanians. The ethnic Hungarian population accounted for 6,5 percent of the country's population, while the number of Roma was 3,2 percent.

The number of people who wanted to declare ethnicity or were not found represented 0,3% of the country's population. Macedonians in Romania are less than 1%.

According to the 2011 population census, the Romanian population had 20.121.641 inhabitants, the number of Romanians was 16.792.868, and the number of minorities was 2.091.963 (the rest of which declared their ethnic affiliation).

The main ethnicity in Romania are:

- ✓ Hungarians (1.227.623),
- ✓ Gypsies (621.573),
- ✓ Ukrainians (50.920),
- ✓ Germans (36.042),
- ✓ Turks (27.698),
- ✓ Russians Lipovan (23.487),
- ✓ Tatars (20.282),
- ✓ Serbs (18.076),
- ✓ Bulgarians (7.336),
- ✓ Croatians (5.408),
- ✓ Greeks (3.668),
- ✓ Italians (3.203),
- ✓ The Jews (3.271),
- ✓ Czechs (2.477),

- ✓ Poles (2.543),
- ✓ Chinese (2.017),
- ✓ Armenians (1.361),
- ✓ Csangos (1.536),
- ✓ Macedonians/Macedon-Slavs (1.264).

In the Oltenia region, residents of 17 ethnic minorities have been found, 13 ethnic minorities have more than 10 people, and 4 of them have fewer than 10 people (such as Slovaks, Tatars, Poles, Croats).

The Oltenia' s greatest ethnicity is that of the gypsies (63.899 members), then that of the Serbs (1.124), followed by ethnic Hungarians (752), Czechs (476), Germans (307), etc.

The number of Slavic Macedonians, 1.264 in the country, is surprising.

There are 503 ethnic Macedonian people in Constanta County, 63 of them live in the Mihail Kogălniceanu locality. There are 59 Macedonians in Tulcea County; In Voluntari from the country Ilfov, 41 Macedonians live; In Slobozia from the country Ialomița, 21 Macedonians appear. There are also Macedonians/Aromas in these localities.

So, to present the situation to Macedonians as best as possible, I will do it through the following tables:

**Table 1. The Ethnic component at the national, regional, and county level**

<b>The area Reference</b>	<b>Romania</b>	<b>Oltenia</b>	<b>Dolj</b>	<b>Gorj</b>	<b>Mehedinți</b>	<b>Olt</b>	<b>Vâlcea</b>
<b>Component ethnic</b>							
Total	20121641	2075642	660544	341594	265390	436400	371714
Romanians	167922868	1901330	594841	321686	236908	400089	347806
Percentage of Romanians in total population (%)	83.46	91.60	90.05	94.17	89.27	91.68	93.57
Gypsies	621573	63899	29839	6698	10919	9504	6939
Share of Roma in total population (%)	3.09	3.08	4.52	1.96	4.11	2.18	1.87
Hungarians	1227623	752	192	134	153	66	207
Share of a total population of Hungarians (%)	6.10	0.04	0.03	0.04	0.06	0.02	0.06
Ukrainians	50920	72	17	24	13	5	13
German	36042	307	60	22	151	11	63
Turks	27698	166	46	11	40	27	42
Russians Lipovan	23487	47	11	11	10	7	8
Serbs	18076	1124	99	17	996	6	6
Bulgarian	7336	80	65	0	6	5	0
Greek	3668	129	91	8	21	0	9
Italians	3203	160	68	28	16	19	29
Jews	3271	79	60	0	11	0	8
Czechs	2477	476	0	10	46	0	0
Macedonians	1264	141	134	0	0	4	3
Another ethnicity	18524	433	243	48	29	53	60
Unexploded	1236810	106341	34747	12879	15624	26588	16503

Source: TEMPO online database (available at: <http://statistici.insse.ro/shop/>)

Note: There are other ethnicity in the Oltenia region, but with a very small number of members, such: as Tatars, Slovaks, Croats, Poles, Chinese, the number of the ethnic groups in question, each of them with less than 10 members, has not been recorded because of this.

### 3. The ethnic composition of the Oltenia population and the territorial distribution of ethnic groups by county

**Table 2: Number and weight of ethnics in the region of Oltenia**

Ethnic group	Total per region of Oltenia	The share of the total population of the region of Oltenia
Romanians	1901330	
Gypsies	63899	3.36
Hungarians	752	0,039
Ukrainians	72	0,003
Germans	307	0.016
Turks	166	0,008
The Russians Lipovan	47	0,002
Serbs	1124	0,059
Bulgarian	80	0,004
Greeks	129	0.006
Italians	160	0.008
Jews	79	0,004
Czechs	476	0,025
Macedonians	141	0,007
Other ethnicity	433	0,022
Unexploded	106341	5,59
total	2.075.642	100,00

In the region of Oltenia, the situation of the main ethnicity relative to the majority population of Romanians, according to the 2011 census, is as follows:

	Oltenia	Dolj	Gorj	Mehedinți	Olt	Vâlcea
Total	2075642	660544	341594	265390	436400	371714
Romanians	1900970	554481	321686	236908	400089	347806
Hungarians	752	192	134	153	66	207
Gypsies	63899	29839	6698	10919	9504	6939
Germans	307	60	22	151	11	63
Turks	166	46	11	40	27	42
Serbs	1124	99	17	996	6	6
Bulgarians	80	65	-	6	5	4
Greeks	129	91	8	21	-	9
Italians	160	68	28	16	19	29
Jews	79	60	-	11	-	8
Czechs	566	-	10	466	-	-
Macedonians	141	134	-	-	4	3

As a result, the number of ethnic Macedonians in Dolj County is 134, representing a share of 0,007 in the total population of Oltenia.

**Table 3: Ethnic distribution in Oltenia counties**

Ethnic group	The counties of Oltenia					Total
	Dolj	Gorj	Mehedinți	Olt	Vâlcea	
Romanians	594.841	321.686	236.908	400.089	347.806	1.901.330
Gypsies	29.839	6.698	10.919	9.504	6.939	63.899
Serbs	99	17	996	6	6	1.124
Hungarians	192	134	153	66	207	752
Czechs	0	10	466	0	0	476
Germans	60	22	151	11	63	307
Turks	46	11	40	27	42	166
Italians	68	28	16	19	29	160

Macedonians	134	0	0	4	3	141
Greeks	91	8	21	0	9	129
Bulgarian	65	0	6	5	0	80
Jews	60	0	11	0	8	79
Ukrainians	17	24	13	5	13	72
The Russian Lipovan	11	11	10	7	8	47
Other ethnicity	243	48	29	53	60	433
Unexploded	34.747	12.879	15.624	26.588	16.503	106.341
Total	660.544	341.594	265.390	436.400	371.714	2.075.642

Source: TEMPO online database (visible at: <http://statistici.insse.ro/shop/>)

Constantin Cășlaru, reported in the monograph of Urzicuța, since 1831, that there are many Slavs, Bulgarians and Serbs, and Macedonians in this locality. 108 Macedonians live in Urzicuța in Dolj County, they are part of the Macedonian Association in Romania, where they edited books to confirm their identity. They have published books about customs, customs, traditional foods, and popular costumes.

In 1902, 20 agricultural workers from Macedonia entered Calafat to work on the estate of Scarlat Ferechive, which is located in Caraula, in Dolj County (Mirea, 2013: 26).

Some documents recognize the Macedonian passage of the Danube and their establishment in Oltenia. Macedonians came mostly from the Ottoman Empire. Many of the telegram Macedonian submitted to Romanian institutions were demands that they wanted to stay in the municipalities of Oltenia. There were many Macedonians who wanted to stay in Oltenia.

Gabril Blagi wrote to the Dolj county prefect on September 14, 1900, asking him to clarify his situation and to grant Romanian rights, legally established and married to a Romanian citizen. He already had a 16-year-old boy and an 8-year-old girl, which is for which the mayor, N. Mihai, says "a Romanian subject, a commune voter and a good family father" (Mirea, 2013: 60). Documents from the archive are facts drawn from the life of some Macedonians.

It is difficult to make a presentation on Macedonian minorities in Romania, especially in Oltenia, because they are few. Although the number of ethnic Macedonians was small, there were times when, due to economic, political, and social circumstances, the number of ethnic people has increased, by creating mixed families.

Macedonians (Macedon-Slavs, a population in the Macedonian area) came in large numbers in 1564-1565, due to some Christian uprising in Macedonia's Mariovo-Prilep region. Another wave of Macedonian emigration was 1595, under the time of Mihai Viteazul. During Tudor Vladimirescu's revolution, Macedonians emigrated to the revolutionary army. The 19th century Christian Rascheles brought another wave of emigration to the Romanian area, and they settled from Oltenia localities. Coming from the Balkan space, through Serbia and Bulgaria, Romanians take the name of Bulgarians, Serbs, Pimblaries, Macedonians (Demetrescu, 1928: 11).

The territory of Macedonia, after the wars of 1912-1913 and the fall of the Ottoman Empire, was divided between Bulgaria, Serbia, and Greece. It has spread to Macedonian media and communities, that is to say, the populations that live it, mainly the Macedon-Slavs, Macedon Romans (Aromas), and Albanians. Macedonia, which made up the Serbian-Croatian-Slovenian Kingdom, the Yugoslav Kingdom, and later the Socialist Federal Republic of Yugoslavia, won autonomy in 1963 and on 8 September 1991 gained independence. Greece has denied the new state's appointment, the name FYROM the former Yugoslav Republic of Macedonia has often been used.

In Dolj County, in Urzicuța, there is an orthodox religious community of Macedonians (Slavs), which is made up of 108 people (3,45% of the total 3.128 inhabitants). At the 2011 census, 134 people were declared Macedonians in Dolj County, of whom 133 live in the village of Urzicuța. They set up a branch of the Macedonian Association in Romania, with the

Community acquiring a deputy seat in the Romanian Parliament (now occupied by Ionel Stancu). The Macedonian Association in Romania was founded in 2000, then Macedonians were recognized as a national minority in Romania thus, in 2001, the association became part of the national minorities Council in Romania (Dumitrescu, Rogobete, Mihailov :28-29).

It is recognized that the Macedon-Slavs/Macedonian Community is confused with the Macedo-Romanian/Macedon-Romanian Community in Romania, as reported in 2013, Emilian Mirea, cultural adviser of the Macedonian Association in Romania: "There is a very strong Macedonian community in southern Romania. We talk about Slavic Macedonians, who are the majority in Macedonia, over 60 percent of the total population. There is a major confusion with the lovers." (Gâscan, 2013).

Macedonians are a minority that can be studied from some points of view: historical, legal, political, sociological, and anthropological. "In a very broad sense, minorities are social, political, ethnic, racial, linguistic, religious, cultural and others, which exist in a society and have fewer members than that of the community to which they belong (the majority of the community). Nowadays, minorities are present in almost all countries of the world, with the number and volume of component members varying from country to country". (Frăsie, Otovescu, 2010: 471)

The concept of a minority has "multiple meanings", which is why "an operational definition of this concept presupposes the existence of principles about which a group of people can be considered a minority: race, ethnicity, language, political power, age, religion, sex. Therefore we can speak of a certain type of minority" (Frăsie, Otovescu, 2010:471), of a population that includes certain age categories, through relations between members of ethnicity, through family/friendly ties, through certain cultural values, but also on the occasion of celebrations. The existence of certain social relations between members of the same ethnic communities guarantees social cohesion but perpetuates it. "Any minority that leads a normal way of life is concerned about its social status, the enhancement of its prestige in society. In the event of majority subordination, the need for social recognition of the minority, respect for its specific characteristics, and appreciation of its own needs by the whole of society appears to be a prevailing psychological and moral need (at individual and group level)". (Frăsie, Otovescu, 2010: 475).

If there is communication between the component units of ethnicity, there is also a social interaction between individuals, and groups, but also a sense of ethnic belonging. In sociology, it is considered that social interaction can be both spontaneous (between relatives, friends, and colleagues), and also organized through the state, it's about the occupational and professional roles that people have in society. If a child is born in a family, he shows us his family relations and the position of his role within this family, which belongs to a certain ethnic community. He informs with parents, brothers, sisters, grandparents, and other relatives, in other words, he acquires certain relationships produced by his position within the family, which he passes on.

When an adult is employed in a working group, his or her relationships are official and guided by his or her status and role in the group, and he or she is determined to work with his or her colleagues in an organized and law-bound framework, Legal status, etc. thus social interaction is organized and formal.

The stronger social interaction in an ethnic community, the stronger the solidarity of those of the same ethnic origin, which also generates a strong self-awareness of the group but also a sense of belonging to each Member "this is why the feeling of solidarity among members of small groups is usually more intense and especially checked when they enter into tense and conflicting relations with other groups (the solidarity of the Roma is widely recognized compared to that of the Romanians in the event of a potential or real danger)" (Frăsie, Otovescu, 2010: 473).

Finally, we describe some ethnic minorities in terms of the views and views of those who make them, so that we can finally estimate the degree of cohesion of those Macedonian communities and their arrival here.

The situation of Macedonian arrival is clear, construction, trade, development of the area's cities, in particular, of Craiova. Some minorities such as Macedonians are risking within the majority community.

The Macedonian minority has only ethnic and cultural organizations with modest activity and representatives. Some are recognized as a majority, others are perceived ambiguously: so Macedonians are confused with other ethnicity. The Macedonian minority is bilingual, it uses the mother tongue for interpersonal, intra Community communication, but uses your language in administration, school and church. Most have close relations with their country of origin.

Ethnic Macedonian is interested in preserving their identity and proving it, which is the result of which they have exhibitions and museum collections everywhere. The approach from the perspective of cultural sociology is a summary of the information on great diversity present in the study. The wording of syntheses is made from the perspective of some identity points defining a culture: language, family relations, the concept of space, and the understanding of time, Macedonians speak a Slavic language.

Mother tongues are often used as a communication tool, except for the Macedonian Community in the south of Dolj County (Giurgița and Băilești), which identifies very few ethnic people who speak their mother tongue fluently. Young Macedonians know about their mother tongue, even at all, or teach it as part of courses held by ethnic Macedonian cultural organizations for the vast majority of minority communities there are religious services in their mother tongue, but not for the Macedonian Community.

From the point of view of family relations, the situation of minority communities is ambiguous. In the past, ethnic Macedonian was mostly endgame, but it was a source of fate and allowed exogamy. This type of family is the basis of integrated social organization, typical of these ethnicity, family, neam, clan. From the point of view of space, we are talking about two aspects of settlement and housing. When referring to ethnic communities, we must specify that the cultural dimension of space is characterized by marginal; it is the settlements of Macedonians in Băilești, who share the peripheral location of the majority Community.

In terms of housing, each community initially had a housing model which kept the features of their area of origin. Over time, this model has undergone cultural changes leading to the adoption of models of another origin. Building in an architectural style is recognized as an identity. It does not aim at functionality, because most of the time buildings are designed with no connection to utilitarianism.

From the point of view of the concept of time, the ratio between profane and celebrated times works perfectly and it is the holiday that fortifies temporal identities, whether secular or religious. We must say that we are dealing with three types of calendars, according to the confessions of existing minorities: The Orthodox, the Orthodox old-style, and Catholic or Protestant. From the point of view of secular holidays, the Macedonian minority has kept a lot of identity festive nuclei, but also practices Romanian holidays, instead, from the point of view of religious holidays there is a special configuration. They are guided by the old-fashioned Orthodox calendar.

#### **4. Conclusions**

The conclusions are aimed at highlighting a scheme for the status of minorities in the European context. Romania has a large number of minorities. Not all of them are the same, numerically, some are well outlined, some less so. Therefore, their contribution to the cultural profile of the area is not the same. All of them, but especially the Macedonian minority, are in a real process of acculturation, but also of preserving their identity, but made disorganized, rather, spectacular.



With some exceptions, administratively structured ethnic communities are in a process of assimilation or dissolution. There is no regional solidarity of minorities, no common policies, no solutions, and no cultural contribution to the construction of national identity.

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# THE CAMEROON NATIONAL TOURISM OFFICE: FROM A SHORT LIFE CYCLE TO A DIFFICULT AND UNCERTAIN REBIRTH

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**Abstract:** *Many public and private institutions or companies created in Cameroon after independence had not only a colonial origin, but also experienced a short life cycle. It is the case of the Cameroon National Tourism Office (CNTO), whose existence has unfortunately been ten years old due to several problems. The objective of this article consists first in tracing the origins of this institution; then to explain the reasons for its short existence; finally, it is about highlighting the difficulties inherent in the effective recreation of a new Tourism Office in Cameroon in the era of decentralization. To do this, secondary sources from history and theory of organizations were exclusively consulted. Their use made it possible to have a much more factual approach oriented towards causality. It turns out that the CNTO created in 1960 is a copy of the France National Tourism Office created in 1910. In addition, the failure of this institution in Cameroon is mainly due to the lack of preparation of the government at the time of its creation. After decades, its effective revival comes up against the administrative slowness and the slow financial and technical empowerment of the decentralized territorial communities which are municipal councils and regions.*

**Keywords:** *Life Cycle; Organization; CNTO; NTOs.*

## 1. Introduction

There are states that have never created a ministry exclusively in charge of tourism and leisure activities. It is the case of France where the administration responsible of tourism is more often merge with other one. Arnaud Barthonet and Alain Monferrand (2012: 26), a French scholar even wrote that tourism only needs a light or a small administration located in regions. It does not really need a whole ministry. From 1960 to 1989, Cameroon had the same vision. That is why government put in place Cameroon National Tourism Office. According to James Kennell (2017:1), National Tourism Offices (NTOs) can be understood as the agencies responsible for the promotion and, sometimes, the management of the development of tourism industry within a country. They usually have a real and strong relationship with a government department or office, and will implement and monitor national tourism policy through different means which can include research, influencing tourism policy making process, destination marketing, tourism product development and the maintenance of national standards for the tourism industry. In the same logic, Penpitcha Polachart (2010:14) says that it is an organization officially responsible for the development and marketing of tourism for a country and one that formulates and implements national tourism policy. NTOs play an important role in collecting statistical information on national tourism industries, including numbers of inbound and outbound tourists, measurements of spending and the other impacts of tourism and the publication of reports on issues affecting the sector (James Kennell, 2017:1). Undoubtedly, their task can also encompass the total tourist offer at the national level. As pioneer of institutions responsible for tourism in this country, Cameroon National Tourism Office experienced a short life cycle that should be analyzed. As points out Michael R. Ford (2016:4), studying organizational life cycles is very necessary because it allows both scholars and practitioners of public administration to concretely understand the common difficulties faced by organizations over their life spans. In addition, it can help policymakers to create stronger organizations or institutions with a long-life cycle. However, in Cameroon, organizational life cycles are not really studied. Consequently, the same causes produce the

same effects. Due to the lack of archives, the life cycle of CNTO is not easy to be analyzed considering the five stages of a normal life cycle which are: Birth or Founding stage, where the organization struggle for survival; Growth stage, when the organization succeeds in creating its distinctive competitive advantage; Maturity stage, when the organization lives on past successes, keeps it direction and focuses on exploitation; Revival stage, that represents a renewed focus of the organization of new possibilities; Decline and Demise (Michal Jirásek and Jan Bílek, 2018: 3-6). In reality, not all organizations pass through all these stages. Only about one-half of new organizations survive longer than one and half years, and only one-quarter see a sixth birthday (Ionescu and Negrusa, 2007: 6). In the framework of this work, it is however more evident to examine it through its birth and demise in one hand, and explain why the state faces difficulties nowadays to concretely recreate it in the other hand. This is what this paper tries to do considering a factual and chronological approach exclusively based on secondary data analysis.

## **2. The creation of the CNTO: from the colonial origins to its birth in 1960**

The objective here is to show that the Cameroon National Tourism Office draws its origins from French colonization. It is also about presenting the actual creation of this technical structure which had a lot of attributions.

### **2.1. Colonial Origins**

The colonial origins of the Cameroon National Tourist Office date back to 1910 in France. Indeed, after the launch of nautical tourism (1904), equestrian tourism (1904), winter tourism (1907), school tourism (1907), mountain tourism (1908), air tourism (1908) and colonial tourism (1909) in this European country, Alexandre Millerand, the Minister of Public Works, Posts and Telecommunications, presented on December 5, 1909 in an amphitheater at the Sorbonne, his idea of setting up the first tourism organization in France. Four months later, on 8 April 1910, the law creating the National Tourism Office (NTO) in France was passed (Barthonnet and Monferrand, 2012: 18-19). The NTO became the "Commissariat General au Tourisme" in 1935, then the General Delegation of Tourism in 1958 (Ibid.). During this time, the promotion and management of tourism in the French colonies in Africa was ensured by the "Association Nationale pour le Développement du Tourisme d'Outre-Mer (ANTOM)" created on 20 January 1955. Made up of actors from the private sector, administrators and civil servants from the Ministry of Overseas France, this association had the specific objective of organizing, supervising, promoting and developing tourism in the colonies (Dulucq, 2009: 10). With the institutionalization of internal autonomy and the advent of independence in these French colonies, and in order to adapt to the new challenges, ANTOM underwent a change of name. Thus, it became the "Office National de Tourisme d'Outre-Mer (ONTOM)" in 1957, then the "Office Central de Tourisme Outre-Mer (OCTOM)" in 1960 (Ibid.). Having become independent on 1 January 1960, Cameroon set up its own Tourist Office.

### **2.2. Birth and organization**

When Ahmadou Ahidjo became Prime Minister of the Autonomous State of Cameroon on February 18, 1958 (Bwele, 1981: 89), he did not create a structure in his government responsible for the development of tourism, as this economic sector was under the responsibility of the "Office National de Tourisme d'Outre-Mer". When he became President of the Republic in 1960 and ONTOM ceased its activities in Cameroon, he did not choose to create a ministry in charge of Cameroonian tourism. Instead, he decided to remain in the spirit of the tourist offices. It was by a decree of August 3, 1960 that he created the Cameroon National Tourist Office in view of the known and unknown tourist potentialities, as well as the urgency to make tourism a sector of activity that contributes effectively to the Gross Domestic Product (GDP). This decree assigns the following objectives to the CNTO:

- to promote tourism in the Republic of Cameroon by making known and appreciating the tourist wealth of this country by all means of propaganda and information;
- to develop and coordinate activities related to tourism in the Republic of Cameroon;
- to safeguard and encourage arts and crafts and folklore;
- to collect all information of tourist interest and ensure its dissemination;
- To study and submit to the Prime Minister all regulatory measures likely to facilitate access to and stay in Cameroon for tourists and to assist in the execution of various provisions;
- To encourage all improvements in the tourist facilities in Cameroon, especially in the hotel industry, to classify hotels, to encourage the training of qualified personnel for the operation of these establishments;
- To ensure the representation of Cameroon's tourist interests within the Central Office of Tourism of African States (Decree n°146, 1960:1).

From its creation, this National Tourist Office, which was successively under the supervision of the Prime Ministry (1960-1967) and the Ministry of Information and Tourism (1967-1970), had several organs that ensured its functioning.

CNTO had three distinct bodies, namely the General Assembly, the Board of Directors and the Management. The General Assembly was made up of honorary members, benefactors and members. The Board of Directors had two categories of members: appointed (representatives of public institutions with a link to tourism) and elected (from the parastatal and private sectors involved in tourism development). The management was headed by a director appointed by the President of the Republic (Dang, 2020: 98-99). Appointed Prime Minister of the Republic of Cameroon on 14 May 1960, Charles Assalé became Chairman of the Board of Directors of the Office on 3 August of the same year. Once at the head of the CNTO, and, in order to achieve his objectives, he sent a letter to the local elected officials inviting them to consolidate, enhance and develop the tourist assets of their territories, particularly the varied landscapes, the fauna, the particular ways of life of the populations, etc. (Ibid. 99). (Ibid. 99). Two years later, he became the President of the African Inter-State Office of Tourism (Eboutou, 2016: 35). This gave him the opportunity to better defend Cameroon's interests in this international organization.

If during its first five years of existence, the CNTO focused on the valorization of the Cameroonian tourist products, during its last five years, it made the promotion of beach tourism its main credo. This is why he initiated the construction of bungalows in Kribi, and an investment of four hundred additional beds in Kribi and Limbe. During the 1968-1969 season, 17,000 international tourists visited Cameroon (Dang, 2020:100). Unfortunately, the office did not survive due to many difficulties. But the abolition of this institution did not put an end to the government's policy of developing tourism. Other related institutions will be successively created to become later the Ministry of Tourism. In reality, it evolved under various names such as the "Commissariat Général au tourisme" on the 12<sup>th</sup> June 1970, the General Delegation of Tourism on November 25, 1975 and then in 1986, the Secretariat of state in charge of tourism (Eboutou, 2021: 58-61). In 1989, aware of the place of tourism in the economic, social and cultural development of the States, President Paul Biya created a ministerial department exclusively responsible for tourism.

### **3. The demise of the CNTO: paradoxical coincidence with the causes of the failure of the French National Tourism Office**

Though in a nutshell the unpreparedness of the State of Cameroon tinged with more bureaucracy and financial problems is the main cause for the fall of the CNTO. This part will show that there are similarities between the reasons of the failure of the two organizations in France and in Cameroon.

### **3.1. The reasons of the decline of the French National Tourism Office**

Though the France National Tourism Office lasted long 25 five years old, many reasons caused it demise. These are: the violent repercussions of the international economic crisis which started 1929 in The United States of America and expanded in the world. Then, we can also consider the fact that the French had a bad image of their Tourism Office. Finally, the financial management was not good at all. That is why the Office did pay the rent for the “Maison de France in 1933 and 1934” (Barthonnet and Monferrand, 2012: 20).

### **3.2. The unpreparedness of the state of Cameroon**

After 10 years of operation, the Cameroon National Tourist Office was abolished on the 12<sup>th</sup> June 1970. The reasons that explain this suppression certainly revolve around the unpreparedness of the Cameroonian government to create such a technical and ambitious structure. This unpreparedness is evident in several aspects.

Indeed, President Ahidjo just copied the French model without really having the means. It was not possible to find a staff really trained in tourism or hotel management, because even if he had an important administrative career before being appointed President of the Board of Directors of this institution, Charles Assalé had only a training as a nurse and a trade unionist. Moreover, when the structure was set up in 1960, Cameroon did not yet have a real legal framework for tourism and the hotel industry. As a result, there was confusion of roles, as the staff were sometimes obliged to substitute themselves as travel agents and tourist guides to accompany international tourists within the country (Nkenne and Wamba, 2011: 65). The real normative texts appeared in 1973 during the era of the General Commissariat for Tourism, which had replaced the CNTO. This is the case of Decree No. 73/660 of 22 October 1973 on tourism agencies. In addition to the general provisions, its voluminous application text signed on June 13, 1975 by Youssoufa Daouda, Minister of Industrial and Commercial Development, dealt with the following points:

- the opening, succession, and purchase of tourism agencies and non-profit tourism associations;
- the operation of a tourism agency or a non-profit tourism association;
- control and inspection of tourism agencies and non-profit tourism associations;
- liability and obligations of tourism agencies and non-profit tourism associations and tourists; and sanctions (Decision n°32/MINDIC).

Other texts followed in 1990. These were Decree No. 90/1467 of 9 November 1990, fixing the conditions and modalities for the construction of tourism establishments; and Decree No. 90/1468 of 9 November 1990, fixing the conditions and modalities for the opening of a tourism agency. The framework law was adopted in 1998. It is moreover this law through its application decree which revived in vain the idea of a tourism office in Cameroon. At last, it should be noted that, the government was unable to easily recovery the fruit of its investment due to the mismanagement of fund, hence the suppression of the Office (Nkenne and Wamba, 2011: 65).

## **4. The new approach of the tourism office in Cameroon: understanding the implementation difficulties**

It is meant to talk about the problems of the Local Tourist Offices which are supposed to be the precursors of a new Cameroon National Tourist Office.

### **4.1. Creation of Municipal or Regional Tourist Offices as a precursor to a new National Tourist Office**

In contrary to its approach of creating the Cameroon National Tourist Office in 1960, the Cameroonian government decided to give a new impetus at the local level by setting up Communal, Intercommunal or Regional Tourist Offices. This was the consequence of an electoral promise made in 1997 by President Biya. In fact, in his ten-point programme, tourism

was ranked fifth and was mainly concerned with its promotion. To this end, President Biya made a commitment to make tourism the lever of the economy by 2004 through an innovative programme. (Yonkeu, 2012: 55). To ensure the materialization of this vision, a series of measures were adopted. These included the creation of the first Tourist Information Office of Cameroon in Paris in 1998, the adoption of Law n°98/006 of 14 April 1998 relating to touristic activities as well as Decree n°99/443/PM of 25 March 1999 laying down the modalities of application of the law. Article 49 of the said decree states:

(1) The tourist office is a communal or regional public establishment in charge of promoting tourism in a decentralized territorial community.

In this respect:

- it ensures a mission of reception and tourist information in case of non-existence or deficiency of the tourist initiative union;

- it ensures the promotion of tourism in the municipality or the region;

- it may, at the request of the municipal or regional council, or of the supervisory authority, draw up and implement the tourist policy of the municipality or region, and local tourist development programmes (development of tourist products, operation of tourist facilities and training)

(2) The tourist office may take the form of a public administrative establishment, a public establishment of an industrial and commercial nature or a mixed economy company.

(3) The communes of the same department may join together to create an inter-communal tourist office (Decree n°99/443/PM, 1998: 13).

These offices are headed by two bodies, namely the management committee and the management. The management committee comprises, under the chairmanship of the mayor or the president of the region, municipal or regional councilors appointed by the municipal or regional council, and representatives of professions or associations interested in tourism. These municipal or regional councilors must represent at least one-sixth and at most one-third of the total number of members of the committee. The management is headed by a director with a profile in line with the administration of a tourism and hotel structure or from among persons with sufficient professional experience in this field (Ibid:14).

#### **4.2. Obstacles to the resurrection of Cameroon National Tourism Office**

If the creation of these local tourism offices is real on paper, their effectiveness is still delayed for many reasons. First of all, there are administrative delays. Indeed, after the creation of the regions by the Constitution of January 18, 1996, it was only on December 6, 2020 that the first regional councils were created (Mbohou, 2020:1), i.e. 24 years later. To this can be added the lack of consideration given to touristic activities due to insufficient financial resources. In reality, most of the communes in Cameroon had something in common: the salary arrears of municipal staff. As a result, out of the ten regions that exist, only the Western Region has a Regional Tourism Office. Out of the 360 councils in Cameroon, barely ten have Municipal Tourist Offices. The case of Mayo-Oulo Council in the North region perfectly illustrates this financial problem. In reality, the Mayo-Oulo Council Tourist Office (MOCTO) was created by municipal deliberation n°012/DM/C/SG/MO of 7 May 2020. It comprises 4 staff members, namely a director, a head of the reception department, a head of the promotion and quality department, a head of the tourism production and development department and an accountant. The sum of monthly salaries (plus allowances), which is XAF 830,000, cannot be paid (Archives Mayo-Oulo council, 2020:3). All this means that, up to date, Cameroon does not yet have an Inter-municipal Tourist Office, which may be a hindrance to the resurrection of the Cameroon National Tourist Office.

#### **Conclusions**

In short, the aim was to examine the life cycle of the Cameroon National Tourism Office created eight months after Cameroon's independence, and to analyze the shift in the policy of

creating a new Tourist Office in Cameroon following the establishment of communal or regional tourist offices. It turns out that the CNTO had French colonial origins dating back to 1910. Its short life cycle can be explained by the lack of maturation in its creation by President Ahmadou Ahidjo. Finally, the resurrection of this institution through the setting up of local tourist offices in a context of decentralization is plagued by the weight of bureaucracy, administrative slowness and the modest financial resources of the communes. It is hoped that with the sources of income of the councils and regions following the example of the general decentralization allocation which is 15% of the State budget (Law No. 2019/024, 2019: 10), that these local offices will be densified in order to impulse from below the creation of a new national office which will enable the Cameroonian tourism industry to compete more with those of other countries.

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# THE PROBLEM OF METHOD IN THE SOCIAL SCIENCES

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**Abstract:** *We aim through this analytical paper to get closer to the method in the social sciences and to try to discuss the most important methodological details that the researcher encounters in this field, compared to the experimental sciences and the material sciences in which the methods have witnessed great development thanks to the nature of the studied material and the continuous studies to develop methods in these sciences. Considering that the social sciences are sciences that have recently separated from philosophy, and even still combine them with theoretical overlaps. Therefore, we tried to explain the method in the social sciences and drop the existing methods in the experimental sciences, and we focused on the main point that separated the sciences from philosophy, which is the "law" and the determinism of social phenomena, since whenever we provide the same reasons, the same results inevitably give us, and this is only available with the presence of Laws appear in the social sciences differently from their counterparts in other sciences, in the form of theoretical approaches and models of analysis. We also talked about the rules of the method in the social sciences, by which a particular phenomenon can be described as a "sociological" phenomenon.*

**Keywords:** *curriculum; social sciences; analysis model; theoretical approach.*

## 1. Introduction

The accuracy of the social sciences raises on the level of scientific rigor, and on the level of inevitability, a set of questions that resonate in the minds of researchers and specialists, epistemological questions, which are almost engulfing many in a spiral of increasing doubt that reaches the point of scepticism, but rather the certainty that they are not sciences in the true sense of the word, We find the researcher and even experienced in these sciences finds various names in their forms, branches, and concepts, we find him does not penetrate the truth of these sciences and does not try to just wonder between himself and his perceptions in the truth of what he studies and what he offers as a scientific material to others, in a break between himself questioning the nature of the social sciences and their forms, in a complex intellectual process, formed between two basic ideas:

First of which is that the specialist and the worker in the fields of Social Sciences is well aware of what the scientific phenomenon means And what are their characteristics and features far from thought and philosophy ... Well aware of the nature of the word "science" and its strong and clear connotations.

The second is that he is aware of the reality of the social phenomenon and the controversy surrounding change, relativity, instability and constancy, the process seems complicated in projecting the first concept on the second, and attributing the variable "science" to the variable "social phenomenon", it seems-perhaps- Entering into the study of a synthetic relationship between them is one of the forms of involving oneself in a circle of doubt if not fear of the difficulty of the synthetic perception of the two concepts, the researcher's self resorts to escape from thinking about this relationship, while the relationship remains standing raises questions on itself and appears occasionally to the you can change it, guide it and understand it. the immersion in the experimental field in the study of natural phenomena, material sciences, biology, and other experimental sciences and mathematics, would give the tint of scientific rigor, accuracy, and objectivity to the researcher's perceptions, thought and experiments, and

even the interpretation of everything that surrounds him, so we find many who are creative in philosophy and Social Sciences, the payoff of their scientific and methodical as a revolutionary methodology, we find, for example, Ludwig von Bertalanffy and Gaston Bachelard, The first studied the Natural Sciences, cells, exchange, and cell division and extracted from them approaches that he was able to employ in sociology by projecting the concept of the cell on the social pattern and then theorizing the exchange between the Social system instead of cells, and division in society instead of cells as well, and adaptation and other thought bases for a major theory in sociology called the Systematic theory in sociology, and the pioneer of scientific philosophy, Gaston Bachelard, spoke about many details in which he refers indirectly and directly at other times about the application of these existing approaches in the natural sciences, physics, chemistry, and mathematics to the social sciences, he considered that the application of these approaches to the Social Sciences is easier than others because others deal with a rigid material that changes only by adding dimensions or indicators, while Man is the material that can be experimented on and observe its behaviours by introducing these indicators.

There is a consumerist saying that every knowledge has a "subject" and a "method" is a science !!!!! It is an untrue and naive word that comes out only from mouths that do not understand what science originally means, while philosophy has a method and a subject and yet it is not science. The only separation between the spaces of philosophy and science is "law," and every study that does not contain law is a philosophical or intellectual study devoid of science, the law is the fixed rule that manages and reads phenomena if the same causes inevitably lead to the same results.

## **2. Law in the social sciences**

can ask questions scramble the mind of the researcher and experienced in the Social Sciences, the most important according to the details mentioned above:

Are there laws in the social sciences so that we can consider them science?

Do the same causes in social phenomena inevitably lead to the same causes?

If we can find systematic exits and convincing answers, we have overcome the crisis between us and the subject, and thus consider the social sciences as real Sciences, and if we cannot, we have reduced decades of research that we thought was social science to put it aside to the crucible of thought and philosophical studies.

Explicitly ... Arab sociology seems very weak compared to its counterparts, whether European or American, Latin American or even Asian, is weak because the variables of its origin were not spontaneously imposed by the logic of origin as in Europe and others, it is a matter of trying to imitate others, no more and no less, by the principle of "*they have sociology, we must have*" without understanding its problematic and its existence in the University and life in general, and our talk about sociology does not mean theoretical material and approaches and history only, all sociology as a comprehensive science with its methods and methods of work.

A good understanding of the method and methodology would remove confusion about sociology because our sociological subjects have become a mixture between philosophy, social thought, Islamic education, and other "Collective conscience" that Pierre Bourdieu spoke of in the book "the profession of a sociologist" (Pierre Bourdieu, Chamboredon and Passeron, 1968), and what Durkheim established in the book "Rules of the method in sociology" (Durkheim, 1988), or what the pioneer of scientific philosophy Gaston Bachelard on the need to break and break away from preconceived ideas about topics.

The law in the physical sciences, to name a few, is a scientific template consisting of variables, relationships between them, and results, for example in a simple law that "speed is equal to the quotient of dividing distance by the time". The variables are speed and time, the relationship between them is division, and the result is speed.

These physical laws are laws characterized by accuracy and generality (generalization) and the researcher has to measure them anywhere, any time and any circumstance, they are laws the product of research and measurements established the principle of determinism,

where whenever the same reasons are available (distance, time) inevitably gave the same results (speed), and the researcher uses the law after providing data and measurements adopted by the researcher in the study of the phenomenon.

#### *A. The theoretical approach and the model of analysis makes the law in sociology*

Through what has been pointed that the researcher in the natural, physical, or other sciences need a scientific law that absorbs his study and gives it a scientific character because he built it according to a scientific approach and a model of analysis is a certified scientific law, to reach accurate results, the same principle exists in sociology but not the same as our perceptions of the law, it carries the same formula (variables, results, and relationships) but it is in line with the nature of sociology, which needs two important elements "theoretical approach" and "analysis model".

The theoretical approach is the theoretical holder (scientific) adopted by the researcher, through which the problematic is built up to put forward the existing problem or phenomenon through the concepts of the approach and its questions and forms and parts, the researcher extracts the social topic from the lack transparency of social reality and by projecting a theoretical approximation that enough to include the subject and give it a sociological angle. Every science extracts the subject and adopts it not because the subject belongs to a specific science, but because it is that science that has captured the subject through its approaches.

Sociology, like all other Sciences, has its approaches that some researchers jump on, ignoring the authority of the method and the scientific rigor that must be followed, they consider that the starting questions that they formulate are problematic, and therefore they reduce the stages of the real methodology and go beyond the "scientific laws" turn their studies into mere absurd talk based on and sociological methodology.

#### *B. Analysis model*

Just as researchers in the natural and physical sciences and others rely on analysis models are laws through which they study the relationships between variables, in sociology analysis models must be consulted and based on them in the analysis of social phenomena and formulated as hypotheses for the study. We are all well aware that the popular definition of the hypothesis is "that temporary explanation of a problem or a temporary answer to a problematic question of a phenomenon", which is a false and incomplete definition that flouts the scientific sociology and storms it away from scientific rigor, while we can add one word that can eliminate the errors of this definition, such as saying "it is a temporary **scientific** answer", and we can be sure that the best definition of the hypothesis and the analysis model is " scientific law project".

Therefore, analysis models that are based on sociological approaches are the only way to put the research on the right methodological path, hypotheses must have scientific justifications approaches and not pre-speculations that may be personal pushing the research towards a path other than sociological research.

Social laws are found in many sociological theories and we give, for example, a sociological law of Durkheim that can be tested in time or space "the more social cohesion, the less suicide" when the group is cohesive in which individuals and crystallize values and rules of behaviour to regulate relations between individuals, in other words, the group works to help individuals find effective ways to achieve what they want and therefore the rates of suicide in such societies" (Ahmed, 2003:118.) ... This sociological law is valid for every place and time so that another theorist can refute it, as Robert Merton did with the Talcott-Parsons theory he modified, so to say that the hypothesis has been denied carries two possibilities: /

- That the construction of the analysis model was in an unscientific way and prior personal speculation has nothing to do with sociology or the methodology.
- Or that the researcher became a theorist in sociology.

Claude Bernard is the first to formulate a scientific hypothesis in his experiment: "one day, someone brought me rabbits that he had bought from the market. When I put her on the lab table, she urinated, and I noticed by chance that her urine was clear and acidic. He drew attention to what I noticed, because the urine of rabbits is usually colourless and not acidic, considering that they are herbivores, while the urine of carnivores is, as is known, clear and acidic. My observation of the acidity in the urine of rabbits led me to imagine that these animals were subjected to a diet suitable for carnivores. She hypothesized that it was more likely that they had not tasted food for a long time, and that, with prolonged constipation, they had turned into carnivores that would feed on their blood to survive. I have found nothing easier than to verify, by experience, the validity of this supposed idea or hypothesis.

Hypotheses are therefore based on scientific references that make the framework of research into a scientific project rather than speculative, as the hypothesis consists of two or more variables.

All authentic scientific studies begin with a perception of the method, a general perception that allows the researcher margins approach his research with a precise look and a deep perception of the method or the way through which he can pursue a scientific way transcends his ideas to reach safety to reveal the truth and its hidden causes, "There is no science except what is hidden" (Bachelard, 1949: 38) science is based on the search for a complete separation. Therefore, the method in the social sciences must be consistent in its stages according to logical sequential principles as pointed out by Emile Durkheim:

#### *A. No transparency of social reality*

The research that enters into the subtleties of the phenomenon and tries to dive into its parts and manifestations is purposeful research, the researcher's vision must be an opaque reality different from the colloquial vision, the topics in the social sciences are not given based on the transparency of social reality, which includes hidden reasons that need what is called "sociological imagination" (Wright Mills, 1977), which is "the conceptual (fictional) restoration of the fabric of social life that has disappeared today to a great extent"(Giddens, 1982: 43), in order to decipher them and find a clear vision of their causes and search for a diagnosis of their problems.

#### *B. Social interpretation*

This step or this perception is very important for those who wanted to realize the true meaning of sociological studies, because this perception separates completely between the sciences, and determines the fields of research, and the space of its experiences and approaches, wherein the Social Sciences is the interpretation of Social causes, that is, every social phenomenon has its corresponding social meaning. Social is subject to the criteria of sociological approaches, that is, the sociological approach is the one that extract the subject and raises it to scientific levels, and gives it sociological interpretation, a departure from this rule makes the path of research deviate from the real path of social science and away from the reality Social interpretation in metaphysical, religious or psychological makes the subject take a context other than sociological research, that is, the social phenomenon must be offset by what is social measurable, "either the phenomenon is an integral part of the rest of society, including due to the mutual influence between this society and the communities that adjoin it" (Durkheim, 1961: 229-233), so the researcher in social phenomena must be aware of the reality of the social phenomenon and the appropriate ways to reveal its subtleties and causes as Emil Durkheim says, "We must know before starting to search for a way that suits the study of social phenomena the fact of phenomena that people call this name" (Durkheim, 1961: 50).

#### *C. Observation of social phenomena as objects*

As sociology has a systematic position studying the phenomenon as a material thing, and Durkheim stressed the need to address natural phenomena as objects, which is "the

emphasis that explicitly or implicitly emulate the natural sciences, and the application of its view and perceptions of the natural phenomenon on various social phenomena" (Ghaith, 1980: 46), thus Durkheim parallels between the social phenomenon and the natural phenomenon, "just as the organic organism has an expression of the organic organism and its functions, social life is a functional expression of social construction" (Zeid, 1970: 71).

Therefore, Durkheim emphasizes that social phenomena must be observed as objects by eliminating the method of common meanings and unexamined ideas because meanings do not in any way take the place of things themselves. Durkheim believes "that these meanings are similar to idols, i.e. Ghosts, which witness the true view of things and which is imagined by the man that they are the same things, the researcher must look at social phenomena as external objects separate from his inner feeling in the light of this consideration is achieved objectivity of the phenomenon and its scientific character" (Allioua, 2016: 148)

#### *D. The need to rely on the positivist approach*

Which relies on observation, experience, and mathematical supplementation to arrive at the laws, and is related to positivism for Comte with the emergence of the stage of science that characterizes the "positivist stage", which is the last stop in the "law of the three stages" after the "technological stage" (religious) and "metaphysical stage" (philosophical). the positivist doctrine is associated with the "mature" (Comte, 1994: 10-20) product provided by human evolution, and the great services rendered by scientific rationality to him.

Here Comte's position seems ambiguous, on the one hand, he suggests that any proposal cannot be meaningful unless it is crystallized into a concrete act, "while on the other hand, he criticizes imperialism and protests Auguste Comte and Leibniz L for proclaiming the existence of spontaneous mental organizations in man" (Comte, 1994: 34). Not to be confused between the positivist doctrine and the positivist approach in the construction of knowledge, the concept of positivism in the second case is the opposite of "normative", knowledge cannot be a situation only if it deals with what is an object, away from the "normative" that is looking for what should be or what is subjective.

In this field, the pioneer of scientific philosophy, Gaston Bachelard, using some of the basic concepts that have shaken the history of science, such as the concept of "transcendence" and "epistemological break", was the subject of widespread attention and interpretation by his contemporaries, such as the Marxist thinker Althusser, who borrowed the concept of "break" and used it to understand and develop Marx's thought. Althusser's reading of Marx offered to highlight the concepts of experimental or elective problematic, for criticism and review, as most philosophies have used science for justifiable purposes that are outside the objectives of scientific practice. Philosophical interpretations of the results of science in order to demonstrate certain values outside the field of science do not reflect the scientific truth as it is but reflect practical ideological symptoms. One of the tasks of philosophy, according to Althusser, is to draw the boundaries between what is for ideology, on the one hand, and what is for science on the other; that is, to highlight the images and colours of the leakage of theoretical and practical ideology into scientific practice, and scientists understand what they are doing, so Bachelard presented strict methodological conceptions, these conceptions are described by the methodological stages of the scientific method, where the researcher himself is subjected to systematic procedures that make him not indulge in his subjectivity or ideology, but phenomena seem to him as objects, in a wonderful idea to project the scientific method in the natural sciences and the Material Sciences on the Social Sciences.

### **3. The profession of sociologist and rupture with common sense**

In the book of Pierre Bourdieu with Jean-Claude Chamboredon and Jean-Claude Passeron, under the title "The professional sociologist" (Bourdieu, Chamboredon, Passeron, 1968) which was released the first edition of the year 1968 poses Bourdieu foundations of the method of sociological which assumes a hand making the sector with common sense on the

other hand the construction of the project of sociological, and explain the need to make the sector with the common sense of the dangers through which protects them and the joint can be interpreted as a set of views and beliefs accepted in a particular group or social groups peculiarity these views and beliefs is considered as imposed on the thinking and competence.

The common sense that Pierre Bourdieu speaks is shared by most Arab sociologists who live in a state of confusion about what sociology is, its forms and its existence at the University and why they study it for students!!! Yes... You may think that I am a lot pessimistic, but I think I am optimistic because all practitioners in the field of sociology have nothing to do with the real social field, which is society and not teaching students and filling their minds with theoretical approaches that remain more study the student takes in order to succeed in the exam and then forget everything he studied because he does not employ it like a medical student employs his lessons, which he finds a direct application on the ground.

The medical student, for example, takes first-year classes and is trained daily to try to intervene with his knowledge that he received from the University in cases of illness in front of his eyes, to give some help to a patient, give an injection and medical advice to a friend and other practices related to what he is studying ... Then in the second year one of them can be directed to a specialist and prepare himself for surgery, every year he increases and practices his knowledge until he reaches the atom of his knowledge by the end of graduation to become a doctor who is able to understand the patient psychologically and diagnose and treat his disease. It is a medical practice practiced by the student and the professor, the professor teaches in the department but is a surgeon who does not confine himself to providing theoretical lectures, but conducts an operation to save a patient from death, and directs another and is in a permanent relationship with everything new because reality and practice impose on him a pattern of procedures that must be followed or become a failure.

In Arabic sociology... The professor - who is supposed to be in society his field of study - does not enter crowded places such as markets and public transport buses because he does not get out of his air-conditioned car and does not like the "his society", which Pierre Bourdieu described as "fertile with social phenomena" worthy of study. We all carry representations about the reality around us, they give us the interpretations that we think are acceptable and correct for the phenomena we see, these representations serve as a guide and teacher in our daily social activity and give us a sense of understanding of the world around us and in this regard they become necessary for life in society in the colloquial sense.

Thus, in the normal mode of interaction with a person we do not know, we conjure up all kinds of representations aimed at diagnosing him, the outward appearance that allows to know his age and dress to determine his social origin, the manner of his speech and his tone that reveal his geographical origin. But our perception of the world is also shaped by representations, religious systems, political ideologies and scientific formulas are in turn systems of representations that change according to societies and Time stages, but also according to individuals and groups... But the sociologist must come out of the crucible of these representations and submit to the scientific method that will probably give him different results and his representations that he considers correct.

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# THE SOCIOLOGICAL LENS OF ENTERPRISE

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**Abstract:** *For the enterprise, much will happen within and beyond it subject to adjustments as per the society. The contract's strength, term, and rationale are all different. Strong social conventions, which are represented in its law, are also responsible for an organization's existence. This what make, at least, the sociological analysis more important and pertinent. "The Sociological Lens of Enterprise" suggest some levels of sociological analysis as a selection applied to the enterprise. Determining these levels was related to general options. Of course, there are several levels of analysis, several interpretations and essays on classification. Each level or classification carries many theoretical contributions and its affiliated schools where it isn't possible to limit all the contributions. We just adopted some ideas to show the importance of the sociological analysis of the enterprise and its relevance in understanding the individual and society within liaison to these social construction, system and /or entity.*

**Keywords:** enterprise; sociology; analysis; society; culture; rationality.

## 1. Introduction

The first representation of the enterprise appeared with the emergence of the industrial revolution, the rooting of the concept of rationality (Bagla, 2003:07), and the emergence of the 'market'. A central deal in the enterprise's relationship with the various levels of the social tie within the framework of the interaction of labor relations with the market and different outputs in which the market considered as a geographical space where various operations take place.

Notably, the industrial revolution happened in various phases and so did the representation of enterprise. For instance, the first phase appeared in textile, iron, and coal production, while the second one covered energy resources as raw materials for production. It highly used steel in the activities and, as per the rationality of the enterprise; the entire operations would be brought on board. Observably, digitization and automation of production processes climaxed the occurrence of the revolution.

The advancements from inferior to superior, while utilizing the resources, are ideal for the internalization of rationality in enterprises. The needs of human beings changed in line with the times and the environment. The rationality is seen in the adoption and wide use of textile during the revolution. As of that time, the enterprise was subject to the wider matrix as it covered operations in the entire process. The idea of the market would then be conceptualized because of differences in human wants.

The domestic system was dominant in production before the first modern commercial enterprises emerged, and in this system, raw materials were transformed into products through the cooperation of merchants and artisans. While merchants provided the artisans with the raw materials, the artisans transformed the raw materials into finished goods (Johnson, 1981). In exchange for this labor, merchants paid the artists piece by piece and sold the final goods in the markets.

Merchants maintained accounts to record prior exchanges and keep track of widely scattered stocks, while market prices gave all the managerial information they required. As a



result, they did not preserve these accounts to give information for decision-making and control (Johnson, 1981).

Through the industrial revolution, the rationality of enterprises was seen in the production methods and technological advancements that came with the revolution. With the emergence of the market, business would take place with participants drawn from different regions. Cognizant of this, performing the market has not been consistent. This is evidenced by the push and pull forces, relations, and externalities within the sphere. Something would then attach the enterprise to the market reality.

Raymond Aron has a special discussion of the emergence of the industrial society. This type of society, according to Aron, appeared when economic activity was separated from social activity. That is when the Enterprise separated from the family (Aron, 1962: 102) and, as a result, the emergence of open time. According to Aron, a special type of production also appeared, the labor division, which results in the accumulation of capital, and thus the economy increasingly develops, as this new type of production led to the emergence and development of a new civilization.

## **2. Is there a substantial society subject to the logic of the market?**

The enterprise was created in the market space work and push to build a new internal social system. Therefore, to answer this question, we must understand the historical context where there was a bet that existed because of the emergence of individual and collective capital initiatives.

This was produced by a rupture with the traditional economic system, and thus the Enterprise appeared as a building for the foundations of new relations. So, a new social fabric was working against the existence of the outgrowths of the traditional economic and social system linked to the family, the village, the tribe or any similar institutions.

The ideas of 'Adam Smith' and 'Herbert Spencer' had a significant and apparent impact, in the transformation of the Organization's role, in society after the French Revolution. Wherever the emergence of the modern Enterprise linked to the emergence of a new society, where the technical development in France and England (of the 18-19 century) led to the emergence of a kind of "militant liberalism" (Segrestin, 1990: 24), which embodied in the industrial economy development.

In addition, the socialist approach to the conciliatory relationship between the enterprise and the society responded. This was clear in the works of 'Saint-Simon' and 'Auguste Comte', who bet on the possibility of creating social relations, as a new social contract that follows a contractual logic achieves its profit goals but remains within the ethical framework.

## **3. Organization as a "Mini Society" and the development of a new social system**

Diversity in the approaches explaining social ties considering a society subject to interaction in social relations, within the logic of the market, institution, family, and various social systems. This led to the formation of a different social system that includes many contradictions and conflicts and witnessing major transformations in the social ties of the organization and the enterprise, a new type of social system closely related to the economic system produced by society.

There was some clarity regarding the specifics of social relations and it is via this that the social systems emerged. While the enterprise explained the entirety of operations, the mini-society implied that organizations, in some way, adopted structures that configured their definitive elements to the wider society (Crozier, 1963).

It was taken that the place of the whole society comprised the substructures or organizations. People who were the main participants in various endeavors completed societies. Their commitment and action were thus pertinent to the ultimate economic system.

The organization/enterprise as part of a "social structure" of society and its social ties, which is also a recognition of the existence of influential social relations within the enterprise, affecting their internally and externally existence, within the framework of contractual

relationships and symbolic interaction between individuals and the enterprise (Crozier, 1963). The substance of the analysis of the social structure and its functions is based on the values defining the people considering economic systems.

If the enterprise is viewed as a social system, the dominant theories of the enterprise's neglect of social behavior can be interpreted as a reflection of the actual enterprise's neglect of society. This argument has the potential to not only instill a concern for sustainability in the "Enterprise's theory but also to make it more amenable to unconventional institutions such as cooperatives and non-profit organizations (Crozier, 1963).

Therefore, the enterprise considered as a space for interaction, participation, exchange, contradiction, conflict, and acculturation. In this context, what is known as the culture of enterprise represents a problematic examined with a view of the social relations and economic systems.

The mainstream economic model implies people's view of transactions as purely neutral and instrumental. However, considering the exchange (Market logic) process as an object of value may be more realistic, and sometimes even necessary. It can also be linked to the associational advantages that occur when the relational climate shifts from calculative to quasi moral, when people develop a sense of group responsibility. (Thompson and Valentinov, 2017). Despite their pessimism, they acknowledge the capacity of "team spirit and loyalty" to solve collaboration issues.

#### **4. The sociological analysis: strategic actor, Organizational behaviour and the sociocultural / socio political dimensions.**

The field of analysis of the enterprise has changed since the fifties/sixties of the last century, where the work of Crozier and his collaborators, like other sociologists, was very significant. The launch of sociological analysis, which formed the first nucleus, was progressively associated with it, in addition to organizational analyses from other disciplines (social psychology, political science, anthropology, psychoanalysis, epistemology, etc.), where many explanatory paradigms appeared, a triangle of currents belonging to different specializations and often intersecting.

##### **4.1. The Strategic Analysis**

This contemporary approach began with Michel Crozier and Erhard Friedberg (Amblard et al, 1996: 20), who proceeded from the principle of the individual in a situation of work, is not completely restricted in his behavior, this postulate is the opposite of the interpretation based on absolute social determinism that promoted by the Marxist approach (Chanlat, 1992: 98).

The strategic analysis focus on the principle of the multi rationalizes associated with each social Actor, within the organization/enterprise, where he/she possesses a kind of relative freedom within the organizational and /or institutional framework. As every interested in organization and labor sociology knows, the theory of strategic analysis is based on some important concepts.

First, the "areas of uncertainty" where each group of actors, whatever their hierarchical level, always has a certain margin of freedom, with resources and behaviors that are not completely controllable by the other groups or by the formal system. While the existence of the organization / enterprise and its objectives and roles, it contradicts the existence of such type of areas (Pirotton, 2015).

The mastery of these areas of uncertainty is linked to the concept of power, in fact, to its sources. The power is always an A-B relationship, not an attribute of A or an attribute of B, the power indeed does not exist in itself, as Crozier (1963) claims.

The power relationship is only established if the two parties are integrated, at least temporarily, into an organized whole. Special skills such as mastery of communication, access

and the control of information, and mastery of organizational rules and regulations are pertinent to the discussion.

The rationality when actors of the organization, operate based on their rational decisions and choices to solving obstacles and problems that they encounter them, depending on the first solution that attains them, the minimum level of satisfaction, as human nature, the actors always looking for the optimal solution to all problems that fronting them (Crozier and Friedberg, 1977 : 46).

Therefore, it is a “limited rationality”, where the personal value systems, perceptions, economic and social factors are mobilized to generate each type of rationality, not based on “the one best way” of the action. Individuals are part of different actors, who pursue their strategies within the rules of the organization, certain individual strategies can be indeed different, but their rationality can only be discovered once the rationality of the collective game is well established. (Crozier and Thoenig, 1975)

About the “Concrete Action System”, this means the social construct that contains formal and informal rules, above all the relations of interactions and alliances between the different actors. For Friedberg, some actors can change the rules and some regulations. This is the role played by the “marginal secant”, which can make the rules evolve / change by transgressing them (Friedberg, 1997: 54).

Even the theory of Crozier and his collaborators was strongly influenced in terms of the cognitive system of Labour and organization and the general theory. Nevertheless, some reserves and oppositions can be noted. Criticisms of the Crozierian approach are based on the societal effect, where power arises from a complex social system. To this end, in “*Power, Rule and Domination*” of Stewart Clegg (1975) and Steven Lukes (1974) in his “*Power. A Radical View*”, they explain power relations in organizations as the result of a structure of domination manifested in class relations. Instead, to more systemic and structural conceptions based on domination and control as showing the analyses of P. Bourdieu, M. Foucault, and A. Giddens, and others.

#### **4.2. The socio-cultural and anthropological Analysis**

The cultural dimension of the enterprise, with all its complexities and interactions, has been the subject of interest multi-dimensional studies, far from *the one best way* interpretation. This was evident in the work of Sainsaulieu and his research team, who conducted important work in the seventies and eighties of the last century.

About Enterprise/organization and culture, Renaud Sainsaulieu (1977, 1986, 1988) prefers analyzing identity at work. He studies the company as a place of socialization where has the status of the intermediate institution.

Their observations of certain practice and relations within the workspace in a group of workshops and in the administrative departments, made them classify four cultural models within the institutions such as the emotional side, the negotiating side and the acceptance of difference, the selective consensual side that is found in self-made actors, and the widespread cultural side of actors who do not invest in their field of work, etc (Enriquez, 2003: 57). From this, it is necessary to promote cultural learning.

For G. Hofstede, culture can be defined as “the collective programming of the mind” (Hofstede, 1980). This program of the different national cultures can be described with universal dimensions, such as:

- individualism vs collectivism;
- the importance of power distance;
- the need for uncertainty control;
- values called masculine/feminine.

Other dimensions also appear later, for example, long-term/short-term orientation and indulgence (Hofstede and Minkov, 2010), during complementary statistical studies carried out in Asia.

For Philippe d'Iribarne (1989) there are national traditions that are based on socio-political and religious history and we then find the same forms of regulation at the different levels of a society's institutions (State, party, family...). Culture is a question of a meeting of universal and local, globalism and particularism. The particularity is not disappearing, whereas the components of culture are always social constructs and are in fact to be both globalized and particular.

In his major work, "The Logic of Honor", D'Iribarne extracts three logics from three national cultures, in France, there is a "logic of honor", in North America the dominant image is that of the "contract", but in the Netherlands, it is "consensus" (D'Iribarne, 1989). Therefore, Culture according to this thesis, is a matter of context of interpretation (d'Iribarne et al. 2022).

Discussing this level of analysis, the choice of cultural dimensions at the national level is debatable. Moreover, the Hofstede's cultural dimensions, there are other factors on which culture can be analyzed and other levels of evaluation of culture (Badraoui et al, 2014) that can be more epistemic when taking the societal specificity of each society and / or group where the cultural "model" can't be existed or at least cannot function as we expected, neither as we measured it, it is a sensible and complex situation depend to be careful with a level of non generalization.

These levels, according to Witte, are often overlooked due to the nature of the construction of cultures and societies and cannot be unique in representing all nations (Witte, 2012).

National, organizational, and professional culture/identity influenced, according to Geert Hofstede, our organizational behaviors. If employees share the same enterprise and/or professional culture as these studies at IBM illustrate, the differences are only related to national culture. Here it is necessary to main the points. It is based on the fact that the national culture is also a societal culture where the enterprise is nominated as a "mini-society". It is not possible to prove a discontinuity between the two systems, one organizational (enterprise) and the other societal (society), the lived experiences, the social reality of dozens of societies and so many studies prove the undetermined links and passages between the two.

#### **4.3. The behavioural and psycho-sociological analysis:**

The foundation for behavioral and psycho-sociological dynamics analysis is the internalization process that shapes how people perceive and respond in the current situation, according to formulators' dispositions. Clegg and his collaborators (2011) assert that the behaviour of individuals is formed as a reaction and results from mental processes and other interactions. The factors that perpetuate these reactions are those graved in organizational, social, technological, architectural and natural environment spheres. The authors hold that as individuals acquire definitive behaviors they, give events a meaning from their own perception. The idea behind this is that understanding the dimensions of organizational behavior requires consideration of environmental factors, because solving long-term problems in management operations, for example, requires an understanding of organizational dimensions and the disparity between environments, as well as the nature of individual personalities within these environments.

Habitual dispositions, on the other hand, do not manage perceptions and individuals in a wholly unconscious and mechanistic way as structured support elements. The advocates use the concept of enterprise development to connect dispositions to the concept of fields. The institutionalization of a worldview in things and attitudes is what a field is. It identifies the actors' specific desires (invisible or incomprehensible from another perspective) and creates a structured space for positional changes — how actors can strive to achieve their goals.

Within the context of an asymmetrical relationship between two partners, one of them may oppose this definition of the relationship at some time to suggest defining herself (him) herself in a complementary relationship at a high level. As a result, the relational partner may "make a bigger bid" in response, positioning herself (him) too high in the complementary

relationship. This is the symmetrical battle for the high position and perspective of Clegg (1994). This tendency accounts for the symmetrical interaction's typical escalating property once its stability is lost and a so-called runaway occurs, such as quarrels and fights between individuals or national wars (Valitova and Besson, 2021).

Three improvements to the basic concept have been proposed regarding human rationality and perception processes. They're all connected by the concept of perception coherence. The fact that the protagonists' perspectives are both conditioning and arising from the relationship positioning is introduced in our model, still in line with the enterprise in light of sociology. More specifically, cognitive dissonance and the punctuation of sequences of events are linked to perception of coherence. Individuals tend, consciously or unconsciously, to rationalize their perception to construct coherent vision in their perception and cognitive construction.

As found out by Clegg et al. (2011), interactions within organizational set-ups contribute to a collation and synthesis of a holistic sphere in which the people undertake their activities. The values of outcome related contingencies are appraised accordingly, where Clegg and other authors disagree with earlier formulations that assess the density of the organizations based on physical structures and designs. Behaviours are key in the establishment of an organizational framework in the people perceive rightfulness and viability of actions differently (Clegg et al. 2011). This, in turn, calls for an organizational psychology to optimize the constructs on which reactions influence behaviours.

Clegg and Dunkerley (2013) present a critical examination of sociological theorizing. They focus on organizational factors that contribute to behaviors among the people who based events and occurrences on their perception in consideration of specificity. He contextualizes the social world dominated by behaviors in organizations that converge and diverge based on given constructs. A structural and phenomenological analysis of organizations is put across to imply that, with modern evolution in organizations, people develop different perceptions of things and their perspectives influence their decisions.

The organizational trends of Western-American and Asian-Japanese institutions are analyzed, in terms of dimensions related to philosophy and direction, culture, values and goals, strategic linkage and functional arrangements, coordination and control mechanisms, responsibility and role relationships, planning and communication, leadership and style of work teams, incentives, rewards and performance (Clegg et al. 2002). This presents a powerful dimension in which organization trends vary based internal events and externalities.

Integrating an understanding of organizational behavior and the personal dimensions of individuals and the environment in the enterprise provides a significant understanding and analysis. This, works as a sociological analysis at the intervention /applied sociology level, especially with the emerging problems faced by enterprises and organizations in a rapidly changing world, as finally caused by epidemics and disasters, where the concept and processes of work and management are concerned deeply.

#### **4.4. The socio-political analysis: a general view of the side**

All people who are involved in enterprise are concerned with the dynamics of regimes where the socio-political analysis deals with a power view as necessity. For that, power is one of the most basic ideas in sociology since it is the most fundamental process of social life.

For many decades, the concept of power has raised debate among classical and modern philosophers and thinkers. It is a general and permanent concept and phenomenon. It has (and still is) associated with all societies through various historical eras.

Power, on the analytical level, is not limited to the State or to the political organizations. It is a phenomenon that exists in all the total and sub-social organizations in society. Power and his related concepts are a form and a recipe for relationships between individuals and groups.

For a long time, however, power was likely one of the least studied and comprehended concepts/subjects (Islam, 2013). Karl Marx's sociological writings in the 1860s were full of references to power. It was a major theme in the work of Weber in the early 1900s.

The concept is under analysis not only in political sociology and organization but also in other fields of sociology. The exercise and structuring of social power is a major concern. Power has become a focal point in the fields of environment and development.

As power is not a monolithic idea, no accepted single definition exists. However, there are several obvious issues in defining social power (Islam, 2013). Nonetheless, we may extract the key concept emphasized by most writers when seeking to describe social power as the ability to influence social actions. It is a dynamic process that pervades all aspects of social life, rather than a static possession (Friedberg, 1992).

Sociologists are more interested in broad and stable patterns of power, rather than every isolated and minute instance of power exertion, for analytic purposes. The concept of influencing social activity entails overcoming any resistance, opposition, or limitation that may arise.

Some writers use the terms "influence" and "control" interchangeably with "power," while others distinguish "power" from these terms because "the effects of power on the recipient are to some extent involuntary, whereas 'influence' and 'control' are seen as producing a motivational change within affected individuals so that they more or less willingly comply (Islam, 2013).

"Influence" in this context refers to overt engagement, whereas "control" is based primarily on unconscious norm internalization. Since "what begins as fully involuntary compliance may over time transition to willing cooperation, while what appears to be voluntary compliance may simply be a decision to abide by an inevitable mandate," the distinction may appear arbitrary. The exercise of social power can vary from relatively indeterminate social influence to determinate social control, depending on the type and amount of power being exerted and the relative power of the other actors (Olsen and Marger, 1993).

## **5. Conclusions**

People's bonds, group communication, exercising power, leadership, and supervision are not objectively existing beings or objects. They are inter-subjective; therefore, they are made up of the group and individual meaning-making processes. They have a different ontological status than material objects. However, one must overlook the reality that the organizational world is built on material foundations that have a specific meaning but are not bound to that meaning (Crozier, 1963). As a result, material parts of organizational functioning have the ontological status of objective entities, not just inter-subjective beings (Sułkowski, 2009). Machinery, equipment, raw materials, and material goods are examples of this. The enterprise is thus a product of activities within the wider society.

Of course, the process of meaning negotiation isn't entirely rational. Participants in organizational life accept contractual reality as given and obvious while playing social negotiation games unconsciously. Organizational hierarchy, charismatic leadership, authority, informal groups, subcultures, and even strategies all have a traditional character that has solidified into social consensus and is maintained by the participants of interactions in a certain organization (Sułkowski, 2009). For the enterprise, much will happen within and beyond it subject to adjustments as per the society. The contract's strength, term, and rationale are all different. Strong social conventions, which are represented in its law, are also responsible for an organization's existence. In other words, organizational continuity is maintained through participation in the social game and an unconscious trust in the permanence of weak conventions.



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# STUDY OF INTERACTIONS WITHIN INFLUENCE SYSTEMS

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**Abstract:** *This paper presents different methods in order to study the interactions existing in any open system, meaning all the systems, because all are influenced by endogenous and exogenous factors. For example, the influences system which leads the consumer to the buying decision. Specifically, we can analyze the interactions between the influences acting upon the decision, using the energy transfers, given by Onicescu formulas, also applying suitable algorithms, like mathematical algorithms. In the first part, the analysis is based on the information theory, and, using the data from author's research, a recent MS Excel application, promoted specifically for this kind of analysis, revealed a remarkable informational gain due to the interaction between the two selected qualities (dramatism and surprising) in the female segment of the surveys participants. Speaking about the last category, we have chosen the prey-predator algorithm and the reverse matrix algorithm. Our variables are the endogenous factors, two of the selected adjectives which the surveys participants attributed to the anime culture products, and they will replace the original variables of the Lotka-Volterra algorithm, the process of replacement being presented. As a primary result, the graphic representation demonstrates the strong interaction between these two actors. For the second algorithm, the decision system is assimilated to an open dynamical system, as it is. The endogenous influences are unlimited interacting, in a strong way in this case, under the exogenous influences action, the result being the consumer decision. The graphic representation, due to a matrix algorithm, leads to the same result, the strong correlation between the selected endogenous influences, in fact, we have obtained the same image, but in different ways.*

**Keywords:** *algorithm; program; information theory; system influences; interactions*

## 1. Information theory method

The information theory is not enough used as other methods are. In the following, we apply its formulas on a simple example of interaction. A study developed in 2018 by the author, revealed the interaction between the adjectives which the responders attributed to the anime products. We use two of these adjectives like influences upon the buying consumer decision, decision which can be considered the solution of a cyber system.

The numerical results are inserted in the so-called *contingency* table, in which there are noted three adjectives/influences, two of them horizontally, the third vertically, the last being determined by the first and the second. Also, the first two influences interact between them, so we are also interested by the interaction between the *surprising* and the *dramatic* influences, for example, and, of course, by the informational gain upon the decision system, within the female segment of the responders. The result will give us the answer at this question: "*Which influence can be important for the female segment concerning the decision of buying?*", knowing that the female segment is less represented in the survey conducted by the author. Even so, we are interested about the reason which would determine their decision of buying the anime related products.

We have selected the *surprising* influence, knowing the female are interested in everything new, it is one of their characteristic behaviour. They would buy products which cause or lead to *dramatism*, being *surprised* of this new aspect, this new discovered quality. How can the two qualities interfere? How can their interaction influence the classic endogenous influence, meaning it leads to "learning/ education"?

Table 1 reveals the numerical data, for all the three variables involved, each of them with the two possible alternatives (YES or NOT). The first observation is that only the *dramatic* influence has significant difference between its two alternatives, and the second, resulting from the first is that the other two influence are equally represented. So, even in this step, only reading the data in the table, we can conclude that female do appreciate the *dramatism*, associated with the *surprising* quality.

The female participants which selected the adjective *educative*, after they have selected YES *dramatic*, after YES *surprising*, are 22, meaning 30%, so appear that the female segment is determined to buy, being surprised of the anime product *dramatism*, any way, by the interaction of these two qualities. We can consider that for sure because if they select NOT *surprising*, they do the same for the second quality, select NOT *dramatic*, and no distinct *educative* preference is resulting.

The number of the female participants is, in this case, equal to 24, meaning 3,4%. So the single significant result is the interaction between the *surprising* and the *dramatic* qualities, which lead to education, usage or learning.

**Table 1. 2<sup>3</sup> contingency table regarding the female segment**

C(X)	A(Z)	B(Y)		T
		NOT EDUCATIVE	EDUCATIVE	
NOT SURPRISING	NOT DRAMATIC	12	12	24
	DRAMATIC	5	2	7
TOTAL SURPRISING	NOT	17	14	31
SURPRISING	NOT DRAMATIC	6	7	13
	DRAMATIC	8	14	22
TOTAL SURPRISING		14	21	35
TOTAL		31	35	66

Source: author research (Cazacu,2018)

We decided to use, in the first step, the recent MS Excel application, which we have adjusted for arbitrary three variables, *Info-Calculus*, as we have named it. The significant results are:(Figure 1)

$$\Delta(z/x,y)=0,18; \Delta(x/z,y)=0,19; \Delta(y/x,z)=0,04;$$

As far as we see, the greatest influence is due to X=(YES) surprising and Z=(NOT) dramatic, so the female sensibility is once again proved.

Referring to the symbolism in the above formulas: the first formula refers to the combined influence of the dramatic and educative(x and y) qualities upon the third, surprising(z), feature of the anime products. The formula calculates the informational gain which the two first variables (x and y) brought to the third(z). The other two formulas  $\Delta(x/z,y)$  and  $\Delta(y/x,z)$  meanings are similar(making the suitable permutation of the factors involved).

The figure below (Figure 1) presents the image of the excel register result, meaning the data analysis file results, corresponding to the informational formulas inserted in the comments; the detailed calculation is developed in the auxiliary file, attached to the first one by hyperlink. The results of interest, for this specific case, are highlighted by size and color.(Cazacu, 2020) We can see that the 2<sup>3</sup> contingency table is included in the corner of the data analysis file, identically like in the Table 1. Data are the same, and the symbolic notation of the factors involved are inserted in the left side, we have called "DATA ENTRY". Each cell in the center and right center of this file is tied by another in the "AUXILIARY FILE", where the calculus is done. The formulas which are used for this calculus are inserted in the first file, in the comment belonging to each cell. Any data changed in the entry zone leads to the changing

of all the results that appear in the center and right center. In order to have a general arbitrary justified symbolic notation, the affirmative alternative of a variable shall be superscripted with "1" and the negative alternative with "0". Others results are to be mentioned:  $AI(X/Z)=AI(Z/X)$  and  $\Delta(Z/X)=\Delta(X/Z)$ , which are significant, so we conclude that the two qualities have a strong connection and they are important for the female decision. We shall study them in a different table below (Table 2). Looking in the center-right of the file, some results can be selected due to the alternatives of these variable:  $I(Z/X^0, Y)-Ea(Z)=0,06$ ;  $I(Z/X^1, Y^1)-Ea(Z)=0,02$ ;  $I(Z/X^0, Y^1)-Ea(Z)=0,9$ . How could be interpreted these results? They are the energy contributions, in fact, the informational gain to the influences system, due to the alternatives of X: all of them are influencing the *surprising* quality, the first term of them representing the specific importance of the involved alternatives.

**Figure 1. The interaction dramatic- surprising in the female segment, revealed by the INFOCALCULUS application**

DATA ENTRY		INFLUENCES INTERACTIONS				Total	NOTES: NOT Z=Z <sup>1</sup> ; NOT X=X <sup>1</sup> ; NOT Y=Y <sup>1</sup> ; YES Z=Z <sup>1</sup> ; YES Y=Y <sup>1</sup> ; YES X=X <sup>1</sup>
EXAMPLE: X(C)= SURPRISING Y(B)=EDUCATIONAL Z(A)= DRAMATIC	X (C)	Z (A)	NOT Y (B1)	YES Y (B2)			
	X <sup>0</sup>	Z <sup>0</sup>	12	12	24		
	X <sup>1</sup>	Z <sup>1</sup>	5	7	12		
	Total X <sup>0</sup>		17	14	31		
	X <sup>0</sup>	Z <sup>0</sup>	6	7	13		
	X <sup>1</sup>	Z <sup>1</sup>	8	14	22		
	Total X <sup>1</sup>		14	21	35		
	TOTAL		31	35	66		
AI(Z/Y)=X from Z=C from A= AUXILIARY_FILEC46- AXILIARY_FILEC64= 0,08=8%		AI= INFORMATIONAL CONTRIBUTION Δ= INFORMATIONAL GAIN				I(X/Y,Z)= IMPORTANCE-DUE TO THE ADJUSTED ENERGIES AND THE SPECIFIC WEIGHTS	
$AI(Z/Y) = E(Z/Y) - E(Z)$		$\Delta(Z/X, Y) = (E(Z, X, Y) - E(Z)) - E(X)$				$I(Z/X, Y) = M(Ea(X/Y, Z)) - Ea(Z)$	
$\Delta(X/Z)$	$\Delta(Z/X)$	AI(Z/Y) A from B	AI(X/Z) A from B	Z from X, Y A from B, C	$\Delta(Z, X, Y)$	$I(X/Y^1, Z^1) - Ea(X)$	$I(Z/X^1, Y^1) - Ea(Z)$
16%	16%	8%	8%	18%	18%	0,13	0,02
$\Delta(X/Z)$	$\Delta(Z/X)$	Z from X A from B, C	Z from Y A from B, C	Z from X, Y A from B, C	$\Delta(Z, X, Y)$	$I(Z/X^0, Y^0) - Ea(Z)$	$I(Z/X^0, Y^1) - Ea(Z)$
0,16	0,16	0,08	0,00	0,18	0,18	0,03	0,09
$\Delta(X, Y)$	$\Delta(Y, X)$	AI(Y/X) B from C	AI(Y/Z) B from A	Y from X, Z B from A, C	$\Delta(Y, X, Z)$	$I(Z/X^1, Y^0) - Ea(Z)$	$I(Z/X^0, Y^0) - Ea(Z) =$
0,00	0,00	1%	0%	4%	4%	-0,01	0,06
$\Delta(Z, Y)$	$\Delta(Y, Z)$	Y from X B from C	Y from Z B from A	Y from X, Z B from A, C	$\Delta(Y, X, Z)$	$M(Ea(Z/X^0, Y)) - Ea(Z)$	$M(Ea(Z/X^1, Y)) - Ea(Z)$
0,00	0,00	0,01	0,00	0,04	0,04	0,14	0,02
$\Delta(Y, X)$	$\Delta(X, Y)$	X from Y C from B	AI(X/Z) C from A	X from Y, Z C from A, B	$\Delta(X, Y, Z)$	$M(Ea(Z/X, Y^1)) - Ea(Z)$	$I(Z/X^1, Y^1) - Ea(Z) =$
2%	2%	2%	8%	19%	19%	0,02	0,00
$\Delta(Y, X)$	$\Delta(X, Y)$	X from Y C from B	X from Z C from A	X from Y, Z C from A, B	$\Delta(X, Y, Z)$	$M(Ea(Z/X, Y^0)) - Ea(Z)$	$M(Ea(X/Y, Z^1)) - Ea(X)$
0,02	0,02	0,02	0,08	0,19	0,19	0,03	0,14
$\Delta(Y, Z) = W_1 \cdot E_1(Y, Z) + W_2 \cdot E_2(Y, Z) - E_0(Y, Z)$		$AI(X/Z) = E(X/Z) - E(X)$				$\Delta(X, Y, Z) = (E(X, Y, Z)) - E_0(X)$	
$\Delta(X, Y) = W_1 \cdot E_1(X, Y) + W_2 \cdot E_2(X, Y) - E_0(X, Y)$		$AI(Y/Z) = E(Y/Z) - E(Y)$				$\Delta(Y, X, Z) = W_1 \cdot E_1(Y, X, Z) + W_2 \cdot E_2(Y, X, Z) - E_0(Y, X, Z)$	
$\Delta(X, Y) = W_1 \cdot E_1(X, Y) + W_2 \cdot E_2(X, Y) - E_0(X, Y)$		$\Delta(X, Y, Z) = (E(X, Y, Z)) - E_0(X)$				$\Delta(X, Y, Z) = W_1 \cdot E_1(X, Y, Z) + W_2 \cdot E_2(X, Y, Z) - E_0(X, Y, Z)$	
$\Delta(X, Y) = W_1 \cdot E_1(X, Y) + W_2 \cdot E_2(X, Y) - E_0(X, Y)$		$\Delta(X, Y, Z) = (E(X, Y, Z)) - E_0(X)$				$\Delta(X, Y, Z) = W_1 \cdot E_1(X, Y, Z) + W_2 \cdot E_2(X, Y, Z) - E_0(X, Y, Z)$	

Source: Data analysis file using INFOCALCULUS application

The numerical data resulted from the author survey lead to the conclusion that the *educative* quality, is equally represented in its both alternatives, that is why we have decided to study the others two influences: *dramatic* and *surprising*, in order to find **the reasons which impress the female segment, particularly their buying decision**, in this case for purchase anime products. The importance of the informational contribution **AI** and of the informational gain **Δ**, together with the correlation indicator **K**, revealed by the information theory, was proved once again.

The answer to our question was: the female segment is strongly impressed by the interaction between *surprising* and *dramatic*, which influenced the buying decision of this segment of responders.

In the following table, the specific energy of the *dramatic* quality in the *surprising* alternatives presence, are very different: 0,30 for the negative and 0,70 for the positive one-YES *dramatic*(the adjusted importance), meaning that the dramatic nature of the anime products is powered by the surprise they produce in the female segment of the responders. The correlation  $C(Z/X)=0,423$  leads to the strong relation  $K(Z/X)=0,72$ , due to the influence of

X(the surprising character) upon Z(the dramatic feature). When changing the determined variable with the determinant one, the results are similar:  $C(Z/X)=0,429$  and  $K(Z/X)=0,729$ . That is the explanation for the final results, which can be considered equal, more or less an insignificant difference:  $AI(Z/X)\cong AI(X/Z)= 0,08$ (informational contribution) and  $\Delta(Z/X)\cong \Delta(X/Z)= 0,16$ (informational gain) The conclusion is that the two features are influencing equally one another and determine the consumer decision.

**Table 2. Calculus referring to the first order interaction “dramatic- surprising” in the female segment**

	<i>Z<sub>1</sub>=not dramatic</i>	<i>Z<sub>2</sub>=dramatic</i>	<i>Total</i>
<b>X<sub>1</sub>=no surprising</b>	<b>24(b)</b>	<b>7(a)</b>	<b>31</b>
<b>X<sub>2</sub>=surprising</b>	<b>13(d)</b>	<b>22(c)</b>	<b>35</b>
<b>Total</b>	<b>37</b>	<b>29</b>	<b>66</b>
<b>W<sub>i</sub>(i=1,2)</b>	<b>0,56</b>	<b>0,44</b>	
H(Z <sub>i</sub> /X)	0,94	0,80	1,73
Ea(Z <sub>i</sub> /X)	0,09	0,27	0,36
R(H(Z <sub>i</sub> /X))	0,06	0,20	0,27
R(Ea(Z <sub>i</sub> /X))	0,25	0,75	1,00
<b>I (Z<sub>i</sub>/X)</b>	<b>0,05</b>	<b>0,12</b>	0,17
<b>Ia (Z<sub>i</sub>/X)</b>	<b>0,30</b>	<b>0,70</b>	1,00
<b>E(Z<sub>i</sub>/X)</b>	<b>0,54</b>	0,63	0,50
<b>C(Z/X)</b>	<b>0,423</b>	<b>CORRELATION</b>	
<b>K(Z/X)</b>	<b>0,72</b>	<b>STRONG RELATION</b>	
<b>C(X/Z)</b>	<b>0,429</b>	<b>CORRELATION</b>	
<b>K(X/Z)</b>	<b>0,73</b>	<b>STRONG RELATION</b>	
<b>AI(Z/X)≅AI(X/Z)</b>	<b>0,08</b>	<b>Informational contribution=8%</b>	
<b>Δ(Z/X)≅Δ(X/Z)</b>	<b>0,16</b>	<b>Informational gain=16%</b>	

Source: Information theory results ( final results are approximated, due to the decimal sequence, with an error less than 1%,)

**K** coefficient has demonstrated a strong relation( $K = 0,73$ ), the informational contribution was moderate, but significant in both directions:  $AI (X/Z)\approx AI(Z/X)=0,8=8\%$ , and the informational gain of the *dramatic* attribute, due to the *surprising* quality,  $\Delta(Z/X)=16\%$  and also, the informational gain of the *surprising* attribute, due to the *dramatic* quality was equal with:  $\Delta(X/Z)= 16\%$ .

As consequence, the interaction between the two attributes, *dramatic* and *surprising* is sufficient enough for the buying decision of the female consumer. So, referring to the  $X\leftarrow\rightarrow Z$  determination, the influence of the *surprising* feeling over the *dramatic* impression and inverted, in both cases, we can notice the importance of the informational gain (16%) (meaning that the female consumer can be subjective).

The formulas of interest in this example, are presented in the following and inserted in the auxiliar file of the INFOCALCULUS register (Figure 1). It has been noted:  $X=$ *surprising* quality, with two alternatives, affirmative- $X_1$ , negative-  $X_2$ , and  $Z=$ *dramatic* quality, with two similar alternatives. When an influence is conditioned by another, the usual notation is: A/B, meaning the first is conditioned by the second. The formulas use the informational energy transmission, replacing the probabilities with the marginal frequencies. (T=66 is the total number of the female responders)

$$M(E(Z/X)) = E(Z/X_1) \cdot X_1/T + E(Z/X_2) \cdot X_2/T =$$

$$= 0,65 \cdot 31/66 + 0,53 \cdot 35/66 = 0,588 \quad (1)$$

$$E(Z/X_1) = \left(\frac{24}{31}\right)^2 + \left(\frac{7}{31}\right)^2 ; E(Z/X_2) = \left(\frac{13}{35}\right)^2 + \left(\frac{22}{35}\right)^2$$

The formulas regarding the impact of the *surprising* influence over the *dramatic* quality of the studied subject, starts from the average of the Onicescu energies, as consequence of this interaction. The informational contribution due to the *surprising* influence is given as it follows:

$$AI(Z/X) = M(E(Z/X)) - E(Z) = 0,588 - 0,507 \cong 0,081 \cong 8\% \quad (2)$$

The reverse influence gives the same result:

$$AI(X/Z) \approx 0,082 \cong 8\% \quad (3)$$

For calculate the informational gain determined by the surprising quality, so the female segment decision for buying be favorable, it is used the average of the adjusted conditioned energies:

$$\begin{aligned} M_a(E(Z/X)) &= 2 \cdot M(E(Z/X)) - 1 = \\ &= E_a(Z/X_1) \cdot X_1/T + E_a(Z/X_2) \cdot X_2/T = \\ &= 0,3 \cdot 0,47 + 0,07 \cdot 0,53 = 0,178 \cong 18\% \end{aligned} \quad (4)$$

from which must be excluded the adjusted energy belonging to the dramatic quality itself:

$$\Delta(Z/X) = M_a(E(Z/X)) - E_a(Z) = 0,18 - 0,2 = 0,16 \quad (5)$$

The same informational gain is calculated for the reverse influence, in a similar way:  $\Delta(X/Z) = 0,16$

Other results of interest, which support the main file of the register in Figure 1, refer to the details calculations, meaning the calculation of the main formulas components. We must also remind the informational gain of *surprising* quality, due to the *dramatic* attribute and the *educational* influence:

$$\begin{aligned} \Delta(X/Y, Z) &= M_a(X/Y, Z) - E_a(X) = 2 \cdot M(X/Y, Z) - 1 - E_a(X) = 0,197 - 0,004 \cong 0,19 \\ \omega_{11} \cdot E(X/Y_1, Z_1) &+ \omega_{12} \cdot E(X/Y_1, Z_2) + \omega_{21} \cdot E(X/Y_2, Z_1) + \omega_{22} \cdot E(X/Y_2, Z_2) = 0,598 \end{aligned} \quad (6)$$

$$\omega_{11} = \frac{18}{66}, \omega_{12} = \frac{13}{66}, \omega_{21} = \frac{19}{66}, \omega_{22} = \frac{16}{66}$$

These are details calculations, which can be found in the auxiliary file of the register, and contain themselves some results, in the same file:

$$E(X/Y_1, Z_1) = 0,56 = \left(\frac{12}{18}\right)^2 + \left(\frac{6}{18}\right)^2; E(X/Y_1, Z_2) = E(X/Y_2, Z_1) = 0,53; E(X/Y_2, Z_2) = 0,78 \quad (7)$$

The interaction is similar concerning the informational gain of the dramatic quality, due to the other two attributes:

$$\Delta(Z/X, Y) = M_a(Z/X, Y) - E_a(Z) \cong 0,18 \quad (8)$$

## 2. Algorithms for graphical representation and study of the influences interactions systems

### 2.1 Lotka-Volterra algorithm

As we know, the original *Volterra model* is formed by two equations(Drăgoescu,2011):

$$\frac{dN}{dt} = N(a - bP), \frac{dP}{dt} = P(cN - d) \quad (9)$$

where  $N(t)$  is the first type variable(the *prey*) which, in our case, is replaced by the *dramatic* influence,  $P(t)$  is the second variable(the *predators* population) replaced by the *surprising* quality influence, both depending on time  $t$ .  $a, b, c, d$  are positive constants, having the following meanings:

a) In the absence of the *surprising* quality, the *dramatic* influence could grow unboundedly, this aspect being represented by the  $aN$  term;

- b) The component  $-bNP$  which is depending of both qualities, and represents the result of the *surprising* feature to the *dramatic* growth quality;
- c) In absence of the *dramatic* quality, the *surprising* evolution is exponential decreasing, as shows the  $-dP$  component;
- d) The *dramatic* contribution to the *surprising* quality growth is revealed by  $cNP$  term and it is proportional to both characteristics.

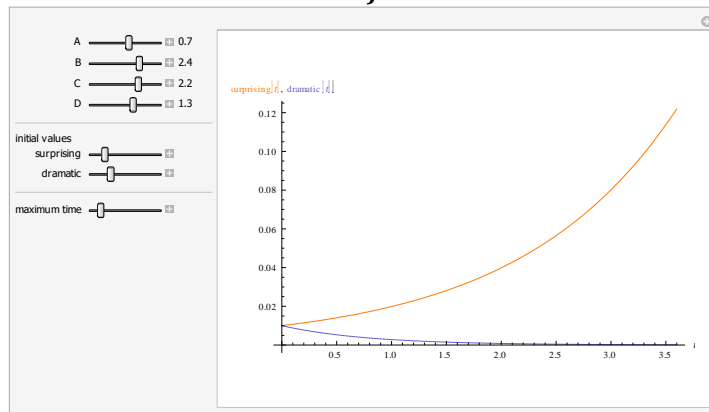
The  $NP$  term represents the conversion of energy from one source to another:  $bNP$  is taken from the *dramatic* quality and  $cNP$  is accumulated to the *surprising* quality. (a proportional term to both, approached to the *potential source* at the moment, but modified in one or another direction by the constant coefficients  $b$  and  $c$  ).

Because of the replacements, the system given by equation (9) becomes :

$$\frac{dZ}{dt} = Z(a - bX), \quad \frac{dX}{dt} = X(cZ - d) \tag{9'}$$

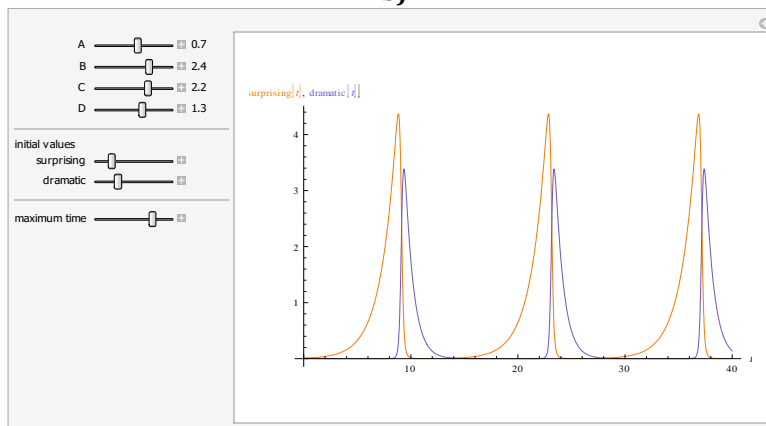
The Lotka-Volterra program gives a graphic evolution of the two qualities, which, in this case, with the replacements that have been made, are: the *dramatic* quality for the first variable (instead of the *prey* variable from Lotka-Volterra algorithm) and the *surprising* quality for the second variable (instead of the *predator* variable in the Lotka-Volterra algorithm)

**Figure 2. Result of the adapted Lotka-Volterra algorithm**  
a)



*The evolution at the initial time*

b)



*Trajectory evolution for a longer time*

In time, the evolution is changing, both of them having intervals of growth respectively intervals decreasing. Also, it must be mentioned the short disparity of their trajectories. But the most interesting feature of the trajectory is the periodicity, in other words, the ciclicity of movement, a feature which has to be studied all the same.

**Figure 3. The Lotka Volterra type algorithm**

```

LotkaVolterra[{a_,b_,c_,d_},{z0_,x0_},t1_]:=Module[{z,x,t},
  {z,x}/.Quiet[NDSolve[{
    z'[t]=a z[t]-b z[t] x[t],
    x'[t]=c x[t]z[t]-d x[t],
    z[0]=0.01,
    x[0]=0.01
  },{z,x},{t,0,t1}]]//Flatten
];
// Replacing the parameters with numerical values prevailed from Table 2
a=0.7 ; b=2.4; c=2.2; d=1.3;

Manipulate[Module[
{soln,col1=RGBColor[1.,47,0],col2=ColorData["HTML","SlateBlue"]},
Plot[Evaluate[#[[1]][t],#[[2]][t]]&[soln=Quiet@LotkaVolterra[{a,b,c,d},{surprising0,dramatic0},t
max]]],{t,0,Min[tmax,Min#[[1,1,2]]&/@soln]}],
AxesLabel=TraditionalForm/@{t,{Style[surprising[t],col1],Style[dramatic[t],col2]}},
PlotRange=All,AxesOrigin->{0,0},PlotStyle={col1,col2},ImageSize={400,300},ImagePadding->{{40,
10},{10,25}}],
{{a,1,"A"},-5,5,.01,ImageSize=Tiny,Appearance="Labeled"},{{b,1,"B"},-
5,5,.01,ImageSize=Tiny,Appearance="Labeled"},{{c,1,"C"},-
5,5,.01,ImageSize=Tiny,Appearance="Labeled"},{{d,1,"D"},-
5,5,.01,ImageSize=Tiny,Appearance="Labeled"},Delimiter,
"initial values",
{{surprising0,3,"surprising"},0,20,ImageSize=Tiny},
{{dramatic0,5,"dramatic"},0,20,ImageSize=Tiny},Delimiter,{{tmax,40,"maximum
time"},.01,50,ImageSize=Tiny},
SaveDefinitions=True,ControlPlacement=Left]

```

Source: *The LotkaVolterra standard algorithm adapted to the studied example*

The mathematical algorithm of Lotka-Volterra has been modified according to the new variables, data and system sources, as it is presented in the equations (9') In the above figure, the first image refers to the initial moment graphic, and the second graphical representation is the time evolution of the system trajectory. As for the coefficients, a,b,c,d, they are provided from Table 2 data.

Other example refers to the anime phenomenon and its evolution. We shall prove that the interdependence between the anime qualities is not singular. The influences system is, as we have said, an open dynamic system. The most important of the endogenous influences, under the exogenous action, is the interaction between *need* and *preference*. They seem to describe a cycle, in time determining one another.

The anime culture is a culture that has formed around Japanese animation, generically called anime. This type of animation, in addition to specific visual elements, incorporated a multitude of elements of the universal culture, as well as elements of Japanese culture, considered exotic by Western audiences. After a very good reception of the anime by the American audience, followed its localization in English and subsequently, its spread all over the world.

Anime was not popularized through a centralized effort, fans of this type of animation spread its knowledge through their own effort, **from person to person**. This activity of collecting and distributing anime, started around the '80s, was the first form of cultural event related to this type of animation. Even if in the 80's the Internet did not exist in its current form,

with the help of the means of that time, the knowledge of anime managed to transcend the borders of the USA and to penetrate even beyond the "iron curtain", thus reaching Romania.

In the 1990's, in the context of the spread of democracy in Eastern European countries, the phenomenon of globalization, and the development of the Internet, the knowledge of anime spread globally, and the cultural manifestations related to anime were diversified. In 2000, the concept of "cool Japan" appeared, which can be defined as a cultural influence of Japanese media products on the Western consumer. Also starting with the 2000s, **two categories of consumers of anime products are outlined.**

The first category is the occasional consumer, who buys these products along with other similar products, but which are not from Japan. The second category was found to be associated with the purchase of these products of gender cultural events, such as fansubbing, cosplay, making doujinshi, attending conventions, etc.

They are the main responsible for spreading the information and implicitly, the knowledge of the anime phenomenon.

In the specialised literature, it was shown that the spread of knowledge of the anime phenomenon in Romania, had as effect a series of cultural events such as gender conventions and cosplay contests, which subsequently led, along with other factors, to the emergence of the anime products.

In the literature, consumers of anime culture products, which play an active role in cultural events related to this culture, are called OTAKU. They represent a **group of consumers who not only buy the products of anime culture, but also play an active role in disseminating information about these products**, making virtually free advertising of this market, with effects not only on the decision of the consumer of media products, , as well as decisions at company and corporation level, to expand the market for these products.

In Romania, a favorable perception (preference) has been formed regarding the type of animation called anime and the cultural manifestations related to it. Some of the consumers of these products do not limit themselves only to their purchase, but also carry out fansubbing activities, unofficial localization of anime in Romanian, and dissemination of information regarding this culture, on discussion groups within the social network facebook, as well as on forums.

This attitude, carried out by a large number of anime fans, lead to the emergence of new fans and consumers, who, in time, become motivated to do the same. We could even speak of a recycling of some elements of universal culture, for the new generations, , with anime culture. Also, the consumer of the anime products, involved in cultural activities, especially in the unofficial marketing of products of this culture, has the opportunity to create new consumers of gender, of which a percentage will achieve the same type of marketing and will contribute to the further spread of this culture, expanding the market for the specific products.

These considerations motivate the reason due to which we present one more example of influences interaction, the most important for the anime spread. (Cazacu, 2018)

**Table 3. Data organized in 2<sup>2</sup> experiment table**

Preference → Need (SECOND SURVEY)			
X(A) var <sub>1</sub>		Y(B) var <sub>5</sub>	
		NO	YES
NO	100	34	66
YES	168	110	58

*Source: author's research*

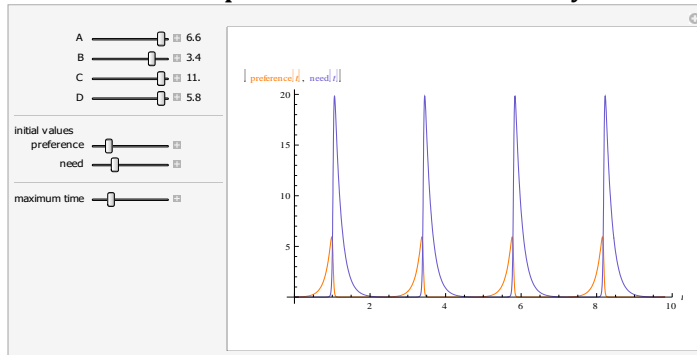
Applying the modified Lotka-Volterra algorithm, it results the time evolution of the two influences, which are determining reciprocally, leading to the conclusion of cyclicity.



The numerical data to complete are the results of these variables interaction, so they have been inserted in the algorithm code.

The differences between the two graphics are as follows: a) the time interval of changing is much more bigger in the first example(15 u.t=time units), in the second is 2 u.t (with approximation) b) in the first graphic, the greatest values seem to synchronize, in the second example, the need is much more bigger than the preference, it appear like the principal factor between the two of them, the determining factor (blue color)

**Figure 4. The need and preference interaction timely evolution**



Source: data from Table 3(author's research)

This demonstrates the cycle:

perception / preference → need → perception / preference

## 2.2 Matrix algorithm

The survey conducted by author(Cazacu,2018) has been developed on a lot of 268 responders, based on a questioner related to the factors which influence the consumer decision regarding the anime products. The female segment, as the rest of the responders, registered positive and negative answers. The attributed adjectives for these products revealed the female responders opinion and the qualities which could influence their buying decision.

**Table 4: Calculus referring to the *dramatic* and *surprising* positive alternatives**

<b>DRAMATIC</b>	<b>29</b>	<b>45,3%</b>
<b>SURPRISING</b>	<b>35</b>	<b>54,6%</b>
<b>TOTAL</b>	<b>64</b>	<b>≅ 100%</b>

Source: author research (Cazacu,2018)

As we do not have all the female respondents, because the total is only 64, will shall consider this number the total number and we shall raport to it:

It has been admitted that the whole consumer behavior can form a complex open system, even time-dependent system, we can consider as dynamic system, its answer being the very decision to buy.

Consequently, we proposed a mathematical model, presented in the next equation:

$$\dot{\mathbf{v}} = a\mathbf{v} + b\mathbf{y} \quad (10)$$

$\mathbf{v}(t)$  refers to the endogenous influences inside the *black box* (Cazacu,2018), meaning the *surprising* and the *dramatic* influences. Equation (10) can be rewritten in terms of the *state* vector, the variable  $\mathbf{v}(t)$  being replaced by the *state* vector  $\mathbf{x}(t) = (x_1(t), x_2(t))$ :

$$\begin{aligned}
\mathbf{v} &= x_1 \\
\dot{x}_1 &= x_2 = \dot{\mathbf{v}} \\
\dot{x}_2 &= x_3 = \ddot{\mathbf{v}} \\
\dot{\mathbf{x}}(t) &= \ddot{\mathbf{v}} = a\dot{\mathbf{v}} + b\mathbf{v} \\
\Rightarrow \dot{\mathbf{x}}(t) &= a_2 x_2(t) + a_1 x_1(t)
\end{aligned}
\tag{11}$$

For the weights of the endogenous influences, we used the notations:  $a_i = \text{weight}(x_i(t))$ ,  $i = 1,2$ :  $a_1 = \text{coefficient}(\text{"yes dramatic"}) = 0,45$ ,  $a_2 = \text{coefficient}(\text{"yes surprising"}) = 0,55$  meaning the positive reponses percentages relative to both qualities attributed to the anime products by the female segment.

The corresponding dynamic system  $(\Sigma)$ , written in terms of *state* equations, was completed using square, symmetrical, non-zero, diagonal matrix coefficients, having the *state* matrix **A**, which represents the inside *black-box* transformations:

$$(\Sigma) \left\{ \begin{aligned} \frac{dx}{dt} &= A \cdot x(t) + B \cdot u = \begin{pmatrix} a_1 & 0 \\ 0 & a_2 \end{pmatrix} \cdot x(t) + \begin{pmatrix} \alpha & 0 \\ 0 & \beta \end{pmatrix} \cdot u \\ y(t) &= C \cdot x(t): \quad x_0 = x(0) = x_{init} = x_{i=(1,1)} \end{aligned} \right.
\tag{12}$$

**C** is the matrix coefficient of the system result,  $\mathbf{u}=(u_1, u_2)$  is the exogenous influences vector, meaning the disturbing vector, with the coefficient matrix **B**, and  $\mathbf{y}(t)=(y_1(t), y_2(t))$  is the system response vector, meaning the consumer decision for buying. Also, the elements  $\alpha, \beta$  of the perturbing matrix **B**, are arbitrary real numbers, and can take values depending on the action of the exogenous factors upon the endogenous ones. For the deterministic proposed model it has been used the so called **semi-inverse method** which gives the analytic solution and its graphical representation, for the dynamic system  $(\Sigma)$ .

In the general case, the initial restrictions are listed in the following equations:

$$\begin{aligned}
A, B, C \in M_n(R), \quad t_1 = 0, t_2 = 1, t > 0, t \in (t_1, t_2) \subset R \\
\det(A + A^t) \neq 0, \quad B = B^t, \quad x_0 = x(0),
\end{aligned}
\tag{13}$$

where: **A**= state matrix, **C**= matrix of the result, **B**= disturbing matrix,  $(t_1, t_2)$  is the time interval of the system evolution,  $A^t, B^t$  are the transposed matrix of **A**, **B**, and  $M_n(R)$  is the set of non-zero symmetric square matrices, of order  $n$ , in our particular example  $n = 2$ .

The system (12) with square matrix coefficients of order 2, real numbers, and initial condition, has solution, the associated control problem leading to the solution of a Bernoulli type equation in the variable  $p(t)$ ,  $p: R \rightarrow L(R)$  continuously differentiable self-adjoint operator on  $(t_0, t_1) \subset R+$ :

$$\dot{p}(t) + \begin{pmatrix} 0,45 & 0 \\ 0 & 0,55 \end{pmatrix} \cdot p(t) - \begin{pmatrix} \alpha^2 & 0 \\ 0 & \beta^2 \end{pmatrix} = 0
\tag{14}$$

with the coefficients:

$$A + A^t = \begin{pmatrix} 0,9 & 0 \\ 0 & 1,1 \end{pmatrix}; B = B^t \rightarrow B \cdot B^t = B^2 = \begin{pmatrix} \alpha^2 & 0 \\ 0 & \beta^2 \end{pmatrix}, \quad \det(A + A^t) = 0,99 \neq 0
\tag{15}$$

The equaton (14) solution is as folows:

$$p(t) = [C_1 - e^{\begin{pmatrix} 0,9 & 0 \\ 0 & 1,1 \end{pmatrix} \cdot t} \cdot C_2]^{-1}
\tag{16}$$

with  $C_1$  and  $C_2$  constant matrix coefficients, solvable with aid of the algorithm

If the conditions (13) are verified, then the solution of the system (12) can be analytically expressed by solving a differential equation

$$\dot{x}(t) = [A - B^2 \cdot p(t)] \cdot x(t) = M(t) \cdot x(t) \Rightarrow \quad (17)$$

resulting:

$$x(t) = x(0) \cdot e^{\int_0^t (A - B^2 \cdot p(v)) dv} \quad (18)$$

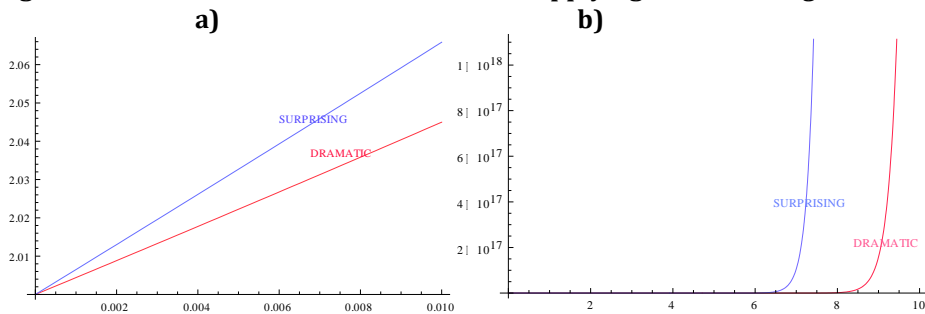
or, with the notations in formula (17) and conditions (13):

$$x(t) = x_0 \cdot e^{\int_0^t M(v) dv} \quad (18')$$

which represents the optimal trajectory in the mentioned conditions.

The algorithm we used (Cazacu, 2016, 2019) to visualize the solution of the dynamical system (12) is therefore based on the "semi-inverse method", which is demonstrated that can be applied in a specific mathematical context, including the conditions (13), to any pair of square matrices, **A** and **B**, and for any initial input data, and, as can be seen, is also very simple. The matrix algorithm was adapted by author to the proposed deterministic model, using the program Mathematica 7.0 (Cazacu, 2016).

**Figure 5. Results of the semi-inverse method applying the matrix algorithm**



a) The trajectory evolution at the initial time

b) The trajectory evolution in a period of time

The applied matrix algorithm was modified according to the studied data, presented in Table 3, so that the system matrix **A** have the corresponding coefficients 0,45 and 0,55:

**Figure 6. The semi-inverse matrix type algorithm**

```
matA=N[{{4.5,0},{0,5.5}}]
matX=matA+Transpose[matA]
I0=-Exp[-matA-matX]
matB=N[{{1,0},{0,0}}]
matB*=Transpose[matB]
S=matB.matB*
C2=Exp[-matX].S.MatrixPower[matX,-1]-I0
C1=S.MatrixPower[matX,-1]
matV=C2.MatrixPower[Exp[matX],t]-C1
p=MatrixPower[-matV,-1]
x0=matA-S.p
xi={1.,1.}
x=xi.Exp[Integrate[x0,{u,0.,t}]]
matC=N[{{1,0},{0,1}}]
y=matC.x
Plot[y,{t,0.,0.1}]
```

Source: The standard matrix algorithm, adapted to the equations in formula (12)

## Conclusions

Following the previous considerations, we will state the main conclusions:

When studying a cyber-system, like are all the open existing systems, we could successfully use the information theory, precisely the Onicescu formulas for the energy transfers. For an easy applying of the information theory, the author proposed an Excel application, which was applied in a particular case study, but can be applied for any arbitrary data., named "Info-calculus". As for the algorithms we used the Lotka-Volterra adapted algorithm has proved the information theory results, meaning the strong interaction between two selected factors: *dramatic* and *surprising* qualities. The other algorithm, maybe less known, called the "matrix algorithm", gives similar graphical representation of the mentioned interaction, and also proposes a possibility for modeling all kind of influences systems, in a relative simple way. The most important result of the study is about the anime culture. The favorable perception (preference) of the anime culture and its products determines the need to buy, and reciprocally, the need to buy influences motivation and determines preference. This cyclicity of the interdependencies between the influencing factors is important, particularly between the need and the preference, as factors which determine the consumer decision, but also, represents the basic mechanism of the spread of the anime culture and of the development of the specific product market.

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# EUROPE AND CHINA: CULTURAL CLASHES OR CULTURAL BLENDING?

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**Abstract:** *The whole world went through a continuous process of change after the IIWW. It was believed that this change would create a new level of conflict for the big civilizations – the cultural level (Huntington, 1993). Starting from the predictions of the past this study follows the impact of technology and globalization on the clashes of civilizations. We argue in this paper that technology and globalization influenced the development of politics and cultures, and pushed them towards toleration. The study analyzes the change of society at both macro and micro levels. For that, we concentrate on the case of Europe and China. Consequently we understand that at a macro level the liberal democratic societies are engines that sustain cultural blending because of their policies oriented towards cultural equality to avoid any economic and political pressures of the economic groups (Carens, 1997). At the opposite pole, we have the example of China, which represents the model of a state which normally would get into a clash of civilizations, but its economic interdependence does not allow to maintain its power if separating from the global market. At a micro level, we analyze the impact of technology and the neo-liberal markets on individuals. As a result, we highlight that technology, access to information, and the capacity of different nations to connect influenced social thinking. We found that the way the neoliberal market has influenced people has brought people closer instead of clashing.*

**Keywords:** *Civilizations; culture clashes; culture blending; Europe; China*

## 1. Introduction

Current international relations are described by a series of events such as the growing role of China, a withdrawal of the United States in its internal affairs, Brexit, the migrant crisis, the illegal annexation of Crimea and Sevastopol by Russia, conflicts in the third world countries, etc. To understand the direction in which the international relations are heading, we adopted two theoretical perspectives: the neoliberal and the realistic one.

The realism helps us to explain the international relations between Western and Eastern Europe, indicating that we are heading for clashes of civilizations. On the other side, the neoliberal approach discusses the economic interdependence of the civilizations projecting a world of blended civilizations in a highly globalized and technologized world. To understand which one of the scenarios describes the best the world we live in, we took the case of the European civilization, and studied its interactions with the Eastern civilization, and the Chinese one.

We discuss the impact of globalization and technologisation over these civilizations and the impact of historical baggage on international relations. As a result, we find that only one theory cannot fully explain all the processes we are witnessing. Thus, the changes happening in the world are described by both scenarios. We have a clash of civilization that cannot be avoided in the context of civilizations with direct borders and territories with common interests. This scenario was confirmed by the illegal annexation of Crimea and Sevastopol by the East and the war in Ukraine from 2022. But we also have the neoliberal scenario, with civilizations blending because of a high level of interaction between them given the globalization, technologisation and the increased communication. This case describes the relations of civilizations that are not in immediate vicinity and have no conflict zones, which transforms them in business partners.

## 2. Defining civilizations

What we consider to be important in everyday life leaves a serious imprint on the way we define a civilization. For this reason, we usually refer to civilizations as to groups of people living in cities (Standage, 2005), but also as systems that have sets of "formal knowledge" (Hord, 1992). Some authors went further and defined the civilizations as an amalgam of both, the infrastructure and the info-material structure (Tarhowski, 2009).

Starting from these perspectives, we may believe that each civilization should have a distinct culture. However, Wei (2011) argued that civilizations are not about one culture, but about a cumulation of cultures practiced within the same civilization, which following many interactions came to have a common denominator.

If we apply Wei's perspective to our world, we can differentiate the following civilizations: West and East (Chou, 2013), Chinese (Granet, 1998), African (Thompson, 1861), Islamic (Savory, 2000; Arberry, 2008), Hindu (Nasir, 2020), Latin American (Keen, 2019), American (Jones, 2013), Confucian (Safer, 2002), Orthodox/ Slavic (Dunn, 2016).

These civilizations exist as separate constructions not only because there are things that make their members look alike, but also because the same elements like "history, language, culture, traditions and religion" (Huntington, 1993: 25) make a difference between them. With all this, the listed items represent not only the differences between civilizations, but also the reasons why the civilizations came closer and closer in time.

As an example we have the Hindu civilization that came to intersect with the Islamic one and influence each other while existing simultaneously as separated civilizations (Nasir, 2020). Another example is the Orthodox civilization and the European one, that came to intersect with other civilizations and cohabit.

But is it possible for these civilizations to exist endlessly in a liberal world and a neo-liberal global market without combining to the point where one can no longer distinguish between one civilization and another?

To answer this question, we must discuss at first Huntington's perspective about the clash of civilizations in the context of current reality.

## 3. Huntington and the clash of civilizations

One of the most famous works on the interactions between civilizations is that of Samuel Huntington "The *clash of civilizations?*" in which he outlined the main features of a civilization and by looking at the historical events and the international reality at the time, he projected some future scenarios of the world's civilizations.

Huntington spoke of civilizations as of cultural entities, sustaining that it is not the number of people that makes a civilization but the powerful character of its culture. For this reason he identified villages, nationalities, ethnic groups, religions, etc. as civilizations with specific cultural aspects. With all this, the great civilizations were called only those that matter for the international order are those that include a larger number of people. With this in mind, Huntington made the difference between small civilizations such as villages or ethnic groups, that he called subcivilizations, and the big civilizations, such as groups of countries. That is, at the macro level, only large conglomerates of states and villages with distinct cultures constituted a great civilization. Following this line of thinking, in his mind, the European civilization is made of subcivilizations, that is, from European states and their cultures, which, despite their differences, have common roots.

Starting from the features of civilizations, the history behind them, and the social reality at the time, Huntington presumed that the great civilizations will clash in the future. Now, because the world has a rich experience in matter of military conflicts including the II WW and the Cold War, Huntington believed that for the common good the civilizations will avoid the military confrontations but will face each other at the cultural level.

A cultural clash of civilizations was believed to happen because of the following reasons:

*1. The civilizations identities will matter.*

Identity is the construct that helps us make a clear difference between “us” and “them” in terms of history, language, tradition, religion and culture. These things have a great role in framing our opinions on topics such as human rights and responsibilities, social organization, principles of human relationships and social behavior, etc. They are the things that give us different knowledge, experiences and make us different.

*2. An increased interaction between civilizations.*

Huntington observed since then that the World is more and more crowded, and because of that the civilizations interact more and as a result we will see easily the differences and similarities between civilizations. The interactions between civilizations increased because of several reasons, namely the technologization, the increased human mobility, the digital market, the movement of capital between civilizations.

*3. The civilizations will go through the growth of consciousness.*

Comparison, which is a completely natural process, is part of our interaction with other civilizations. As a result, we identify the differences between the civilization we belong to and those we interact with. For this reason, Huntington believed that our awareness of the things that make us different will grow and we will appreciate and defend what makes us special.

*4. Loss of influence over identity by nation states.*

The evolution of the world towards a global market and technology has made it easier for people to connect with each other. But, communication between people leads to mutual transfer of ideas, values, principles, and daily practices which results in the alienation of people from local identities. This can be easily noticed in people who go to other countries to work: Eastern and Western Europe for example. People in Eastern Europe started a massive migration process in the 1990s after the collapse of the USSR. Some settled in the Western European countries, others went there just for seasonal work. As a result, they have come to borrow new words, customs, holidays, ideas, with the intention of better integrating into the society in which they work. Consequently, these people got closer to the identity of the country in which they work and moved away from the identity of the country they left (Seweryn, 2007; Bhugra, 2004).

*5. Rigidity to change the cultural characteristics.*

The things that give us certainty about everyday life are related to the customs, traditions, the culture we have. This information guides our lifestyle and makes coexistence possible. So, to be sure in the day that comes, people prefer to change only the things that do not influence directly their daily lives such as policy or economy, which are the means of ensuring social welfare. In this context it is expected that when two civilizations meet on the same territory there will be a confrontation because each of them wants to keep their customs and strengthen their beliefs.

*6. Intensification of economic regionalism.*

From 1980 to 1989 there was a significant increase in economic regionalism (Europe from 51% to 59%, Asia from 33% to 37%, North America from 32% to 36%) (Huntington, 1993: 27). But we also assist to a high raise in the universalism promoted mostly by Europe. And as expected, the universalism increased the interaction between civilizations raising the question of whether we will have a civilization clash or not.

The reasons stated above provided enough evidence an increased interaction between civilizations will highlight the differences between “us “ and “them” and will be the torch to trigger the clash of civilizations translated into racist and anti-cultural reactions.

At a first glance we can say that Huntington’s prediction is a reality. The campaigns “black lives matter” and “stop Asian hate” from the USA since 2015 until 2022 show that there

is a cultural phenomenon initiated by the American civilization that could not tolerate other civilizations flourishing and developing in its bosom, like the African civilization and the Asian one. But, the actions of the American civilization can be explained from an existential perspective. Meaning, we recognize its behavior as being similar to any community or being that struggle for survival. From the moment the 'others' came to be more than them, we saw a response to the feeling of fear that 'others', being more, will come to impose their culture, traditions, customs, social reality, and that in time the Americans will be the minority. From here the aggressive response of the local civilizations that need certainty about the social order of tomorrow being as they always had it.

A similar cultural reaction is present in Europe, which has kept Turkey on the list of candidate countries to the EU membership for decades because of the impact it could have on the Union's Christian civilization.

Turkey has a population of 84.3 million; it surpasses Germany in the citizens' number, and respectively would surpass Germany and any other EU country in the number of European parliamentarians. This would mean to put Turkey as an Islamic civilization at the helm of Europe (Gavrilov, 2019).

So, despite Europe's welcoming attitude, it seems to be on the verge of expanding and allowing the frequent interaction of its Christian civilization with the Islamic one from Turkey.

With all this, today we are witnessing the intensification of processes like globalization and technologization that intensify the interaction between civilizations at both the macro level and the micro level, which makes us wonder if the future holds for us a phenomenon of civilizational blending instead of civilization clashes.

To answer this question, we focus on studying two phenomena, globalization and technologization, and their impact on two relationships of the Western European civilization: with the Eastern European civilization, and with the Chinese civilization.

#### **4. Globalization, technology and civilizational interdependence**

In essence globalization is a social process that involves several phenomena which influence aspects of everyday life to people all around the Globe. Nowadays globalization is associated with the export of American values, ideas and principles in the whole world. Despite all beliefs, the process of communication does not go only one way, and for this reason, globalization cannot be Americanization. It is a global social process that supposes global unity at several levels and activities in which the social relationships, the identities, the individuals, families, communities are negotiated to cohabit in a cultural diversity (Gills and Thompson, 2006).

In the perception of many authors, globalization is a relatively new process. But there are also authors that define it as a process in which policies, practices, money and goods flow are happening at the world scale, which makes globalization old for at least 5.000 years (Wilkinson, 2006). The long history of commercial relations between nations drew bridges between civilizations and created a certain degree of connectivity between the systems. But, systems connectivity means knowing the system you interact with, the values and the things it is based on, the holidays and the traditions that organize society in everyday life in order to plan business relationships, to sell what is most in people's interest. For this reason, the commercial relationships spread the best practices and knowledge around the world. Practically, the economic benefits pushed people towards borrowing ideas, practices, languages, etc. from other cultures with the intention of getting better economic income. But as a result the civilizations got to borrow knowledge and practices from each other on long term, which triggered this process called globalization.

With this in mind, nowadays, globalization happens at several levels:

- *The world labor market*

The world has developed in a way that it is quite impossible to exist as an independent country without needing the help of other states at least in some areas. The world civilizations



understood that they could not avoid the interdependence, so they went even further allowing the globalization of the labor market characterised by a high freedom of motion of the working staff, and the states being open to the free movement of capital, to investments and foreign businesses.

The accelerated development of technology and the transition of work in the online space to overcome the safety issues triggered by the COVID 19 pandemic encouraged the fast adaptation of the labor market to the new digital labor tools. As a result, it has become possible to employ people from other countries in companies that legally develop their activity in other countries.

This is the case of Europe, which benefited greatly from technological development and globalization, to open businesses in China where the labor market is bigger and cheaper. In this case the telework came as a step forward to a high profit in a large labor market with a wide range of choice of the working personnel. As a result, in 2021 the European Chamber of Commerce in China represented around 1700 European businesses (Timsit, 2021). China on the other side invests in the European companies. Between 2010 and 2020 it invested in around 650 businesses, from which many in states like Germany, Italy, France, the Netherlands and Sweden (Datenna, 2021).

The interaction between Europe and China is higher in the latest decade. "China is the EU's biggest source of imports and its second-largest export market". These civilizations got to trade almost over € 1 billion a day (European Commission, 2021). As a result there are plans for mutual influence. The European plan to liberalize the Chinese market started since China joined the World Trade Organization (WTO) in 2001 (European Commission, 2021). One of the main influences of Europe on China is the market management through competition policy.

However, just as collaboration cannot bring about change only on one side, it is not only the European civilization that has left its mark on the Chinese one through trade and economic relations, but also the Chinese civilization who transferred its values, ideas and traditions to Europe. Since 2016 the amount of Chinese investments in the EU has been quickly raising up to 37.2 billion euros. Most of the investments are made in the influential countries for example between 2000 and 2018 China invested around 47.5 billion euros in Germany, 22.5 billion euros in Italy, 15 billion euros in France, 10 billion euros in Netherlands, etc. (Statista, 2021).

The Chinese civilization also influenced Europe through the export of its values, ideas, traditions etc. practiced by the chinese people who came to work in Europe. For example, by the end of 2015 in Europe there were 260.000 legal migrant workers from China, from which 70% resided in Italy and 23% worked in France, Germany, the Netherlands, Spain, and UK (Plewa and Stermsek, 2015).

#### - *Identities and globalization*

Identity is an important aspect for all civilizations, the reason why when nations connected and their identities changed there were authors considering the cultural identity as a victim because they see in globalization a process where the strongest culture dominates the others. In spite of this, Tomlinson (2003) argued that identity is more of a result of globalization than a victim of this process. It is because identity, like language, does not represent just descriptions of things, but it is a result of collective work; it is both discovered and build by people and involves knowledge of more than one country or region.

Indeed, globalization influences identities the reason why some authors believe the identities are attacked by a large-scale process wich intends to form a unique identity, yet, globalization seems to disseminate a set of knowledge, ideas, values, discoveries that helps the development of each identity.

The idea that globalization would threaten local cultures (Hermans and Dimaggio, 2007) stems from the fact that the closer the nations get to each other the less borders we have and less and less differences are to be found between us once we borrow the best practices from eachother. Now, because identities were defined in matter of territory, it seems that one of the

most important aspect that separates identities disappears in a world with mixed people from different civilizations with different identities.

However, we believe that the persistence of an identity depends on the humans that associate with it not with a territory. As an example we have Poland which has disappeared from the map and whose identity has not been lost, because it is a human construction that lies in the people who belong and associate with it.

Still, we cannot deny that globalization makes the world's identities deeply intertwined, and that we can expect in the future to not know exactly what identity and where it is present, to the point of identity homogenization.

#### - *Globalization of political movements*

The occurrence of problems at the global level make their solutions to be disseminated globally, which in return can create global political movements. A first example would be the democratic regimes. The democracy idea was carried on in regions that embraced it in their way, created political parties that complied to the democratic values and principles, and modeled their political systems to fit the democratic ideas they embraced.

Nowadays the global warming is a problem that raised awareness in the world and triggered political movements in this direction. We see now, more than ever, political parties sustaining the clean environment, formulation of policies and taking actions to protect the environment.

The existence of a similar problem worldwide encourages governments to copy the best solutions, to cooperate and establish common actions. This is also the case of Europe and China which have different cooperation tools in this area like, the Environment Policy Dialogue (EPD) since 2003, the Bilateral Coordination Mechanism (BCM) since 2009, the China-Europe Water Platform (CEWP) since 2012, the Circular Economy Mission (CEM) to China since 2016, the EU-China Workshop on Soil Pollution from 2017, Urban EU- China Innovation Platform on sustainable urbanisation (2017- 2019), the EU-China Environment Project (2018-2020), High-Level Trade and Economic Dialogue (HED) (European Commission, 2022).

During these cooperations we can see that mostly Europe transfers its know-how to China. With all this, the recent studies have shown that the Chinese influence is deep in Europe, but it is manifested differently, namely along three dimensions: "the Chinese constraints of: choices and options for local political and economic elites; parameters of local media and public opinion; and the local civil society and academia" (Brattberg et al., 2021: 2).

What we want to say is that globalization made it possible to identify common problems at the level of civilizations and to initiate common political movements to solve them, whether we talk about official political decisions or social movements.

#### - *The affinity of the world systems*

The globalization of world systems is a very old phenomenon, since the emergence of states, democracy and other forms of social organization and communication. Given the evolution of some systems, their model was spread in the world if it proved to be efficient. This way, diplomacy came to be practiced by many states in the whole world, most of the states have a voting system, people got to organize in states, etc.

#### - *Connected Economies*

It is believed that globalization was triggered by a neoliberal system where economy transformed it into a universal process that takes place at different levels.

The truth is that economically globalization is much older and cannot be linked only to the economy. The world systems were at first connected through commerce for a better economy, and only then appeared other types of knowledge exchange. With all this, we recognize that the actual economic system is one of the reasons why globalization intensified. The economic aspirations made the civilizations interacted more for "two major reasons: the

reduced costs to transportation and communication in the private sector, and the reduced policy barriers to trade and investment on the part of the public sector” (Frankel, 2000: 2).

Practically the economic advantages made the world civilizations to connect, but as a result this developed an economic interdependence of the states. As an example of this we have the global economic crisis from 2007-2009, started as a domino effect towards the world economy.

- *Communication as a globalization tool*

Communication is believed to be one of the globalization processes (Monge, 1998) that makes globalization possible but at the same time which is influenced and changed by the globalization itself.

Since communication is these days more about “transborder data flow, media events, global network organization, developmental data communication” (ibid. 142), the globalization of communication cannot be avoided and should not be avoided. As long as globalization is about spreading techniques and new discoveries in the communication area, the spreading of knowledge, it represents a way of developing. The problem arises when we speak about culture and identities, because communication is the key tool in framing a culture. Thus, if the communication of a civilization interferes with ideas, values, inventions, anything from another culture, we witness an import of cultural aspects from one civilization to another.

In the context of technology development, communication became easy and accessible, allowing the civilizations to interact more than ever. As a result increased the interaction between small and big languages (Block, 2004), but most important the spread of the English language.

- *The Globalization language*

Many authors say that globalization is more like a process of Westernization, where the Western civilizations export their ideas, values, discoveries, models of organization to the Eastern civilizations.

But, considering that Western civilizations are North America and Europe, the model that is exported to the East is the one that belongs to the most developed subcivilizations, such as the USA, France, Germany, and the United Kingdom. For this reason, the language of globalization is considered to be English. Still, it is only in the last sixty years that the new Europe, the Europe of the EU, has gained momentum by spreading its model of social organization and its ideas to the world, especially in matter of market economy, trade, culture and so on.

At the moment, English has 1.3 billion speakers (Statista, 2021), ranking it as the most widely spoken language on earth. However, the Chinese language is ascending registering in 2021 a number of 1.1 billion speakers, as a result of the Chinese birth policies (Sharping, 2005).

The leadership of English and Chinese languages cannot be unnoticed in terms of their impact on the linguistic and cultural diversity of the world. Currently 96% of all languages in the world are spoken by almost 3% of the world's population. Two thousand of these languages have less than 1,000 speakers (Noack and Gamio, 2015). This sustains the idea that the civilizations with dominant languages are peaceful conquerors of other civilizations that extend by motivating or imposing people to embrace their language and culture. Yet, we cannot speak of civilizational dominance because a civilization is not only about a language, it is also about traditions, values, principles, the way of doing things, which require time. Still, we do not deny the fact that in time the small civilizations may disappear.

- *Borrowing daily life practices*

Globalization manifests itself in two ways at the macro level and at the micro level. At the macro level globalization spreads management ways of economy, politics and other areas.

At the micro level, however, globalization affects people's daily lives and exists only because it is part of the practices they do every day.

At the core, globalization is nothing more than the result of “multiple social relations through which people communicate in settings structured by power, social capital, locality, organically embedded cultural forms” etc. (Ray, 2007). Thus, globalization without changing the daily life is impossible considering that it is a huge process happening in multiple areas.

- *Globalizing education and knowledge*

The Covid 19 pandemics made education to find in the online space a place where it can develop and grow. As a result, the online education platforms became a common place where people can connect and participate in the education process from all around the Globe.

This model was promoted by the EU through different mobility programs for study, like the Erasmus Program, which offered to students from 33 countries the opportunity to study in any of the participant universities (European Council, 2017).

However the Covid 19 pandemic made the universities invest even more in online education. As a result, trends have been shared and borrowed by most countries which have sought to rapidly adapt the education system to the new social challenges.

Thus, globalization came to impact education in several ways:

- constructed a global educational agenda;
- universalized the standardized teaching and learning;
- sustained the competitive spirit especially in universities that came to compete for funding, prestige, and so on (Sahlberg, 2004).

The Covid 19 pandemic accelerated the world processes and highlighted the following impact of globalization on education:

- shared the best practices in the administration of the education institutions;
- disseminated tools and means of making education possible in the online environment;
- developed and spread online mechanisms of knowledge assessment;
- increased communication between universities;
- built special programs for access to education for those that are unable to pay for education.

Globalization sustained a formation of global awareness, the reason why universities have come to cooperate in matter of teaching and research (Halsey, 1992). A clear example of this is the collaboration between Europe and China which dates back to 2012 when was established the High Level People to People Dialogue between Europe and China, and four years later the "Joint Communication on Elements for a new EU strategy on China" (European Commission, 2017). In spite of this, the historical perspective on education globalization argues that education is a result of globalization because education is a set of knowledge gathered from the whole world.

## **5. Technology and multiculturalism**

Globalization would have been a less visible process in the absence of technology which enabled rapid communication, knowledge sharing, and socialization. Technology is the tool of globalization that allowed the exchange of information between civilizations. Studies from 2013 and 2019 show that technology provides people with means of communication that significantly help improve communication and social interconnection, especially for isolated and lonely people (Culley et al., 2013; Barbosa Neves et al., 2019). It ensures interconnectedness and allows the creation of communities (Chayko, 2014) which bring civilizations close one to another, including the European and the Chinese ones. Between 2015- 2022 technology triggered two major social movements the black lives matter (Clayton, 2018; Clarck, 2019; Wayne Leach and Allen, 2017), and stop Asian hate (Lyu et al., 2021). These movements involve people from different parts of the world that initiated political and social actions to sustain

tolerance, acceptance, diversity and fairness. In response to the cultural clashes underlying these movements, were founded two big communities (see table 1).

**Table 1: Communities involved in #blacklivesmatter and #stopasianhate movements**

Community name	No. of members	The active platforms	Official page
<b>Black Lives Matter</b>	794.292	Facebook	<a href="http://www.blacklivesmatter.com/">http://www.blacklivesmatter.com/</a>
	4.200.000	Instagram	
	1.000.000	Twitter	
	14.847	Linked in	
	677.000	YouTube	
<b>Stop Asian hate</b>	14.555	Facebook	<a href="https://stopaapihate.org/">https://stopaapihate.org/</a>
	363.000	Twitter	
	204.000	Instagram	

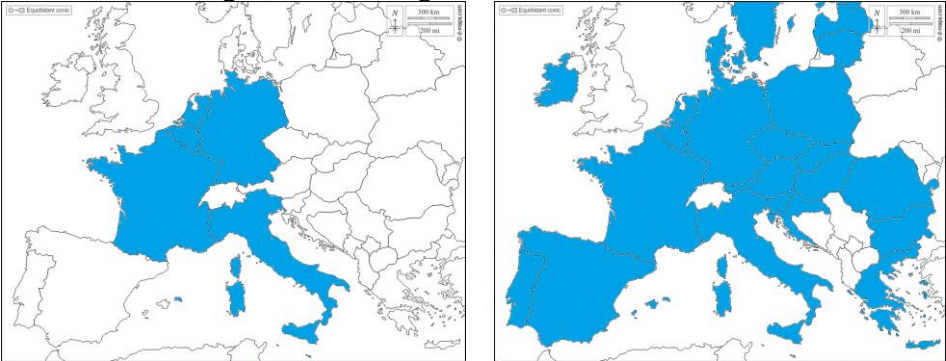
Source: Author's table

It is easy to see that technology allowed the globalization of some problems and the clash of civilizations is one of them. But, it is also difficult to develop in the spirit of civilizational clashes. Therefore, technology became the tool to allow the interconnection of civilizations and the globalization of efficient solutions for civilizational clashes, like developing multicultural policies, creating specific frameworks for complying with the human rights, promoting diversity, founding international cooperation programs for cultural tolerance.

**6. EU and NATO enlargement in the Eastern and South-Eastern Europe- the clashes between West and East**

Europe had a huge word to say regarding the everyday life of other civilizations during centuries of conquering while imposing lifestyles, ideas, languages and everything it valued. Still, we can see that the power of the European civilization changed completely after the IWW, when it decided to follow the path of diplomacy. Once the European states understood the power of a United Europe, they stood by EU and encouraged its expansion in the Eastern and Southeastern Europe, to quickly replace the Soviet ideas and values. The EU enlargement is about the expansion of the Western European civilization towards the Eastern and Southeastern Europe. This movement is for the unity of Europe as a civilization if considering two reasons: one, the need for a clearly delimited space within which the European civilization exists; and two, to behave as a leader by bringing to its side the former communist countries that found themselves in need of a new lifestyle. The expansion of the Western civilization can be observed if looking at the EU enlargement in the last 65 years (see figure 1).

**Figure 1: EU enlargement since 1957 until 2022**



EU map in 1957

EU map in 2022

Source: Author's figure

The West's interest in the southern and south-eastern Europe is not only about expanding its model of life in Europe but also about gaining control over strategic areas such as the Black Sea. On the other hand, the peaceful conquest of the Eastern and South-Eastern Europe also meant a considerable rapprochement of the Western civilization to the Eastern European civilization. This proximity led to a clash of these civilizations considering the thin border between them.

The first signs of a clash of civilizations between the Eastern and the Western Europe, from both military and cultural perspectives were drawn in 2014. The intense dialogue between Ukraine and NATO triggered a strong response of Russia, namely the illegal annexation of Crimea and Sevastopol.

With all this, the EU expansion towards Ukraine is a much older process and an irreversible one. The EU initiated a transfer of values and ideas to Ukraine since its close cooperation with Ukraine through different programs, like, the Horizon Europe and Creative Europe for 2021-2027, which encourage innovation, research, digital transition, creativity, competitiveness, promotion of cultural heritage (European Commission, 2021).

Now, internally Ukraine's alignment to the Western European civilization is a change the people wanted. But, internationally it means moving the border of the Western civilization in the immediate vicinity of the Eastern one. This not only raises military tensions but also issues about creating a precedent, when the Western civilization conquered areas of influence of the Eastern civilization.

Ukraine's closeness with the Western Civilization raised security questions to the Russian Federation. With all this, the Russian reaction to the enlargement of NATO and EU in the Eastern Europe are well known (Marten, 2020), and have been shown each time the states under the Eastern influence made a step towards changing the camp.

It is known that the expansion of NATO represents a political and military key tool to ensure the "security and stability for the entire region" (Clinton, 1994, apud Asmus, Kugler and Larrabee, 1995). This is followed by a cultural, political and economic expansion through the EU enlargement that triggers changes in all areas of daily life in the new member states. For this reason, in 2022 Russia invades Ukraine to change the pro-European political power with a pro-Russian one.

## **7. Civilizational interdependence and blending: the case of Europe and China**

Europe is a continent rich in cultures and for this reason and the history behind, it sustains tolerance and diversity. But also, to be able to work as a big civilization, the European sub-civilizations wanted to avoid any dominant positions that could replace the local cultures, traditions and identities. In this direction the Cultural Convention of 1954 highlighted the importance of respecting and promoting the cultures and the languages of the different nations that were part of it (COE, 1974 apud Calligaro, 2014). Based on this, the EU built policies that encourage diversity, multiculturalism and equality. It also created different tools, like: the European Diversity month, the platform of diversity charters, the Accept Pluralism project, MigRom, CitySpyce, etc. (European Commission, 2022). Thus, diversity became a principle in EU actions, including the moments when intersecting with other civilizations.

Another step towards connecting with other cultures instead of clashing with them is the education sector. The EU Erasmus program encourages both regional cooperation of the EU member countries, acceding countries, candidate countries and potential candidates and the international collaboration of educational institutions around the world. For international collaboration and intercultural connection Europe built tools like the Neighbourhood, Development and International Cooperation - Global Europe Instrument, and the Instrument for pre-accession assistance (IPA III) (European Union, 2022). These tools are used for connecting with the neighboring civilizations including the Chinese one, in matter of culture and education.

Europe and China collaborate closely in matter of culture and education sustaining the mutual understanding for development and prosperity. A proof in this direction is the cultural trading between these civilizations. In 2011 China received from EU cultural products worth 230 million dollars- around 8.3% of all the European cultural exports. On the other side, the EU imports of Chinese cultural products worth 5.09 billion dollars, - almost 27.2% of the total cultural imports.

The cultural cooperation goes further in areas like: film, exchanging theatres and making movies together; design, through the Chinese design platforms, and exchange of experience through exhibitions in both China and EU (France, Germany, the Netherlands); tourism and urbanism, through collaborations between the European and Chinese institutions specialized in urbanism and street art for exchanging experience and cultural understanding (Sino-EU Humanity and Think Tank Summit: Construction of Diversified International Metropolis, 2013; International Design Festival from Berlin, 2012; Project "Cultural Management in China", 2009-2012; etc.) (Qiao et al., 2015).

Europe works hard on changing other aspects of the Chinese civilization too, like the environmental standards. In this direction since 2018 "through updates of the urban planning and technical standard guidelines, through the support and investment made in the Chinese businesses for a clean production" (European Commission, 2017) the Chinese attitude and actions towards environment started to change.

Another area where the European civilization left its mark on the Chinese civilization is the social protection system. Through training of the Chinese officials and preparation there has been initiated a social protection reform.

There is also the EU involvement in the development of Chinese businesses through the consultancy the EU Small and Medium Enterprises Centre offers (European Commission, 2021).

On the other side we have the Chinese civilization that puts its mark on the European one in different ways. The Chinese influence is deep in Europe along three dimensions: "the Chinese constraints of: choices and options for local political and economic elites; parameters of local media and public opinion; and the local civil society and academia" (Brattberg et al., 2021: 2).

The way in which these civilizations manifest is different. If Europe works more at the macro level importing its values and ideas in the official institutions, then the Chinese civilization works at the micro level manipulating public opinion, influencing the decisions of officials, researchers, and businesses.

Thus, in such a globalized and technologized world the European and the Chinese civilizations interact closely. But they manage to tolerate and appreciate the differences and avoid a clash because their ways of working and the directions of expansion are different. As a result, we believe that in the case of the European and Chinese civilizations we are witnessing a civilizational blending which results in: social change in Europe under the Chinese influence, and institutional change in China under the European influence.

## **8. Conclusions**

In the 21<sup>st</sup> century the international relations raised the question of whether we will witness civilization clashes or civilizations blending. To answer this question we developed this study which highlights that at the moment we are witnessing both: a clash of civilizations and a civilizational blending because of factors such as historical reasons, globalization and technologization.

These factors globalized the idea of civilizational clashes and transformed it into a general problem. But then, technology allowed the interconnection of nations and the globalization of solutions to this problem, namely the civilizational blending with respect to all the differences between us.

The interaction of European and Chinese civilization is a proof that we are witnessing a process of civilizational blending. However, the interaction between the Western and Eastern

European civilizations, or between the Chinese and the American civilization, shows that we also witness civilization clashes. This means that the civilizations intentions at the moment are divided between: intending to clash in the case of civilizations with direct borders and historical baggage; and developing peacefully, in the case of totally different civilizations.

With all this, we believe that in the current society the civilizations will orient more towards blending because of the economic interdependence, which encourages cooperation, mutual cultural understanding, and communication in many areas for common development.

Finally, nowadays we have both: clashes of civilizations and civilizational blending. The clashes are triggered because the East and the West have close ways of working, meaning their way of expanding towards other civilizations is a top down one. On the other side, we have two different civilizations like Europe and China. Europe spreads its values, ideas and lifestyle in a top-down way, while China does it bottom- up. Europe changes institutions to impose a lifestyle, while China changes the people that in time will come to change institutions. This makes blending possible, because these civilizations don't get to collide but to change each other.

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# EDUCATION IN THE PENITENTIARY ENVIRONMENT

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**Abstract:** *Prison education aims to address issues of the prison environment, with an emphasis on the role of education in this closed environment and its consequences in terms of personality development. The penitentiary environment is characterized by limited rights, obvious lifestyle changes, major problems of adaptation of detainees. The article contains some hypotheses about the imprint of detention on the individual in terms of the development of his personality and the negative consequences of deprivation of liberty.*

**Keywords:** *penitentiary environment; detention; education; persons deprived of their liberty; socialization; resocialization*

## 1. Introduction

The penitentiary stands out for its construction, as a building with high fences, bars, a closed place and not at all welcoming. It is a totalitarian institution, with well-established boundaries between members inside and society, with life inside the penitentiary being isolated. Although no one wants to get there, it often does. The community of each penitentiary is an anonymous world of people deprived of social prestige. Specific to the detention environment is the lack of freedom, a social issue that aims to prevent cases of deviance or maladaptation. For every person, deprivation of liberty is a special situation, of the coexistence of different people according to sex, language, religion, opinion, temperament, character, economic and social status. Each detainee experiences different moments of adaptation, which seems simple, but in reality he is disappointed, disoriented, desperate and abandoned by his family.

The theme of the prison was and is in the public attention, the penitentiary system being a functional organizational mechanism with essential attributions in the life of the national community. There have been numerous works by famous sociologists on prisons. The penitentiary system is sociologically classified as a total institution, as defined by Erving Goffman, a place where a large number of individuals with similar status, separated from the rest of society for an appreciable period of time and leading together a strictly delimited life, officially regulated by the institution" (Goffman, 2004: 12). The same sociologist framed penitentiaries along with monasteries, military units and warships, nursing homes and psychiatric hospitals identifying the main objectives of total institutions: education and training, fulfillment of economic goals, medical or psychiatric treatment, spiritual or religious purification, protection community security, punishing deviant individuals, these institutions making efforts in a certain way to achieve the objectives and protect the level of authority exercised over the individuals inside the walls. Another sociologist who pays attention to the theme of imprisonment is Cesare Beccaria, who humanizes the idea of punishment by defining it as "the sensitive motivation that removes the despotic soul of every man to plunge into the old chaos the laws of society" (Beccaria, 2001: 36). In his paper he rigorously formulates the principle of legality of incrimination, the principle of proportionality of punishment and proposes - as a measure to prevent the commission of crimes - education.

## 2. Socialization - the role, stages and socializing agents

Socialization is the complex process of becoming human as a social being, a process of acquiring norms and values, as well as social roles. It is a process of transmission and

assimilation by individuals of cultural models, norms and values, knowledge and attitudes, socially desirable behaviors that make them fit to fulfill certain social roles. Through socialization, the human being appropriates the norms, values, traditions and beliefs of the society or group in which he lives. The mechanisms of socialization are based on social learning, respectively the integration of man in social life, so as to adapt to the complex demands that arise during life. Socialization is a process that introduces people to social norms and habits. This process helps individuals to function well in society and, in turn, helps society to function smoothly. Family members, teachers, religious leaders, and colleagues all play key roles in a person's socializing. During socialization, a person learns to become a member of a group, community or society. This process not only gets people used to social groups, but also results in their support. From birth and throughout its evolution, man learns the way of life of the society in which he lives and develops his abilities to interact as an individual and as a member of groups. Through the process of socialization, society exercises considerable power over the members it teaches how it should behave, it is the process of penetrating new individuals in an organized way of life and in an established cultural tradition. „ The mechanisms and agents of socialization know a great variety, ensuring, one by one and all together, the stability and functionality of social structures, internal cohesion, continuity and permanence of group structures. Socialization is carried out in a multitude of forms and situations, by numerous agents, the most important of which are the family, the school, the age groups and the mass media” (Constantinescu, 2006: 44).

In the opinion of Dumitru Popovici, modern society always creates the possibility for man to reintegrate, the habitat once conquered proving to be too tight for its possibilities. He, the man, is looking for new existential opportunities, different in organization and functionality, in which to integrate. In the face of these new existential situations, the individual presents himself as an asocial or partially associative being, which forces him to socialize” (Popovici, 2003: 167).

Socialization is a process that takes place throughout life, the individual assuming or being assigned roles that must be fulfilled, which involves the accumulation of skills and abilities. Socialization in the first stage of life is a primary socialization or the process by which an asocial individual begins to acquire his first social identity. The factors that contribute to this socialization are the educational organizations: kindergarten, school, group of friends and detached family importance. At this stage of primary socialization, the individual begins to represent and interpret his existential environment, now he acquires skills and abilities that allow him to integrate into the social environment. Secondary socialization is prolonged throughout life, because the individual is constantly faced with unique needs for socialization, is forced to learn new roles, to enter organizations that operate according to their own rules and regulations, different from those known. This type of socialization requires the individual, the number of roles played in this stage being a very large one, the necessary knowledge and the network of relationships forcing him to organize assimilation, in the form of education. „... the social relationship is that type of connection between two, three or more social actors who act together, think together, feel together, wait or ask for a response from each other in manifestations of life or common activities, repeatable, sustainable and meaningful” (Otovescu, 2010: 279).

### **3. Resocialization**

Resocialization is also a socialization, but with specific characteristics, because it is done in a specially created framework, and its main objective is social reintegration. In the prison environment, education must be carried out in the succession of time spent in this environment, so that through organized and well-thought-out actions can fulfill the role of resocialization, which does not end with the execution of the sentence, the actions can be continued until later its final. The process of resocialization in the penitentiary environment is carried out mainly through education, but also through the way in which the adult educator

approaches his activity in the prison environment. Detention generates situations that require flexible methods of surrender due to the special conditions of detainees. Among the detainees, there will be a very high percentage of disadvantaged people who have suffered multiple failures. These detainees have little or no training, have a poor self-image and lack participatory skills, are aware of school failure and are convinced that education can do them no good. However, education nevertheless remains the basic act by which the detainee acquires knowledge essential for the life after the execution of the sentence. It is essential that people involved in the educational process in the penitentiary be encouraged to view their students as adults participating in normal educational activities, it is important that they be treated as responsible people who have the opportunity to choose. In other words, it is necessary to minimize the penitentiary context and move the criminal record to the background, so as to create a natural climate of interactions and educational procedures similar to those in the community. What is fundamental for such an approach is that the educational program be based on the individual needs of the participants. This aspect is also found in the conception of Dumitru Popovici, who stated that "education is a deliberate action of socio-organization on the ability to process information, specific to each individual, in order to guide it in a feasible direction, pre-established" (Popovici, 2003: 11).

Regarding education, Sorin Cristea stated that "it is a fundamental psycho-social activity with a specific structural core based on the subject-object correlation (educator-educated) and which evolves, in optimal conditions in the direction of self-education, ie a higher stage of humanization" (Cristea, Constantinescu, 1998: 120-121). Resocialization, also achieved through education, must focus on the prevention of risky behaviors, on social adaptation. It must be initiated from the first day of detention by involving the person in various activities, and the resocialization program must be developed for the entire duration of the detention.

#### **4. Prison education**

Education has an intense manifestation in the social ensemble, generating collective and individual behaviors. Through education, social experience is transmitted from one generation to another, but also from one individual to another, with the aim of both homogenization and differentiation of individuals. „ The definition of education from a sociological perspective allows highlighting the dynamic aspects of the training activity - permanent development of personality in modern and postmodern societies. We take into account the fact that education is an aspect of the socialization process through which people acquire the behaviors necessary for participation in social life " (Constantinescu, 2006: 46).

The importance of education is demonstrated at any time and in any field of social life. The quality of education makes its mark on the destiny of each individual and of each society. Education is a particular type of human action, an intervention or direction of the individual, by providing support and support in order to acquire social norms and values. It is an act that takes place throughout human life; education aims at the conscious development of the human biopsychic potential and the formation of a type of personality required by the present conditions and the perspective of society. We can say that it is a social phenomenon, specifically human, that appears with society, out of a certain need of its own - that of human development as a human being, as a workforce and a social being. Education involves a transfer of values from society to the individual, it is an activity of discipline, cultivation, training of the individual both for himself and for society. As a social action, it is a planned activity that is carried out on the basis of a social project and involves a conscious effort between the educated and the educator. Every human being has certain fundamental rights, but detainees lose one of these rights for a certain period of time, namely the right to liberty. It is well known that in the execution of the sentence some rights are limited: the right to privacy, freedom of movement and freedom of expression. Deprivation of liberty often has dramatic effects on the personality of the person serving a sentence, giving rise to a series of behaviors totally different from those manifested in freedom. The inner turmoil, the conflicts with those around him, the change of

the living space, the alienation from the familiar personal objects make the detainee hostile and demanding. Life in the penitentiary is a group life, interpersonal relationships between detainees are influenced by certain rules, norms, types of activity, there are specific rules and a social stratification of the population in the penitentiary. Difficulties in enforcing a custodial sentence largely depend on the organization of prisons, but also on the phenomenon of overcrowding. The way in which detainees adapt to this environment influences their concerns, social relations, the activities they value and enjoy. Adult education in the prison context is the main task of educators dealing with detainees, education being considered a means of socialization or resocialization. Socialization is the complex process of becoming human as a social being, a process of acquiring certain norms and values. The mechanisms of socialization are based on social learning, respectively the integration of the human being in the social life, the genesis of the models of social behavior and their active assimilation so as to adapt to the complex demands that appear during life. According to Dumitru Otovescu, socialization is a fundamental and complex social process of transforming the human being into a social being, through the conscious internalization of ways of thinking and feeling, norms, values and patterns of behavior or action of society in "a certain moment of her becoming" (Otovescu, 2009: 230). Also in the conception of the same author, "the basis of socialization is the phenomena of training and education, which form and shape the human personality, makes it suitable to meet different demands and social experiences" (Otovescu, 2009: 231). According to Cornel Constantinescu, "socialization is the process by which the human being acquires its own pattern of behavior and its own system of values, attitudes, and their development throughout life. The mature individual is the product of a continuous social process of interaction through which he was offered the opportunity to build an identity, to develop ideas, skills and abilities that give him the opportunity to actively participate in society" (Constantinescu, 2006: 41). Individuals come into direct conflict with social norms accepted by practicing and carrying out actions that impede the functionality of organizations and insecure members of society. „For the inclusion in the social life, for the rebuilding of the social self in accordance with the demands of their existential time and space, the society created, for those concerned, a series of organizations called total, assigning them the role of author of the resocialization process. The most famous in our times are prisons, concentration camps, mental hospitals" (Popovici, 2003: 183).

Prison education is an increasingly important topic, which is why it is being considered more and more based on the idea that deprivation of liberty does not deprive other rights guaranteed from birth. With regard to re-education programs, James McGuire argues that they can be defined as "a set of activities with a specific purpose and involving a large number of interlinked elements; a planned series of learning opportunities for detainees, with the general aim of reducing their risk of recidivism. In order to achieve a change in behavior, it is necessary to adopt a constructive approach, in to moderate unwanted behaviors by applying a method focused on positive reinforcement and a technique to increase the repertoire" (James McGuire, 2000, in Gheorghe Florian, 2005: 73). Criminal punishment has nothing to do with education, therefore the education offered in prisons has the role of fixing the individual in a social context, to provide a specialized framework in which to develop skills, abilities, abilities and social skills. as well as improving school knowledge. Now and here, in this framework, the aim is a construction of moral will, the formation of skills to become a good citizen, to acquire moral and social values unanimously accepted in the community. In adult education in prisons, educators work hard to give inmates the opportunity to self-correct, increase self-esteem, and self-confidence.

The physical and social environment in which the education takes place can strengthen or weaken the detainee's motivation. As far as possible, it is important that the educational activities take place in a special setting, in which it is possible to create an attractive environment, so that the educational center becomes for the detainee a kind of oasis in the penitentiary. Special efforts are needed to attract detainees who could benefit from education, as well as to encourage them to participate in it. Providing information about the different

courses and activities, presenting the teaching methods used, creating a relaxed atmosphere can be points of attraction for participating in the educational process in the penitentiary.

Also of particular importance is the existence of a library in the penitentiary, as it is a source of education, information and entertainment, but also a center for cultural development. The libraries made available to detainees must perform the same functions as modern libraries, open to the public, allow them direct access, as well as frequenting this place. It should be borne in mind that libraries support and expand educational activity, allow the provision of books and other materials necessary for the educational process. The prison library must base its services on the wishes of its clients, include many works, magazines, and the same range and quality of books in public libraries. The stock of books should reflect the multicultural nature of the prison population and take into account the high number of detainees who have difficulty reading or have no reading experience. They should be encouraged to read, by providing a sufficient amount of simplified works, attractively illustrated works, or recorded reading tapes.

## 5. Conclusions

The objectives of education in prisons should not be less important than those of education abroad. Prison education services must aim to facilitate the right to education, which benefits every individual and which is the key to his or her completion as a person. It is necessary to take into account the fact that adult education is one of the factors of economic and social development, because it aims to reduce the discrepancies between general and vocational training. As far as possible and in accordance with the national situation, the development of adult education should be reported to the way of life, responsibilities and problems of adults in the penitentiary environment. The main task of educators caring for detainees is to make efforts to make education in prisons equivalent to education for adults abroad. In other words, penitentiary education has an intrinsic value, regardless of the objectives of any penitentiary system in Council of Europe member states. The work of the educator is a very delicate one, because he must also take into account the context in which the adult education process takes place. Deprivation of liberty causes suffering and personality degradation, and education can play an important role in limiting these consequences. A real education for adults in prisons can help to normalize the abnormal situation, which is detention.

Social education aims to develop the personality and to make the person socially responsible, to form some skills in different fields. It is important for detainees to understand their personal value in society, to be aware of their responsibility to themselves and to others. The activities related to social education will encourage cooperation for carrying out various activities in the penitentiary, assuming generally accepted civic social values and norms.

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# CONSIDERATIONS ON THE EVOLUTION OF ROMANIAN LEGISLATION IN THE AREA OF PROTECTING PERSONS WITH DISABILITIES

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**Abstract:** *The literature suggests that the approach to disability has evolved over the years from the medical to the social model and later, with the adoption of the Convention on the Rights of Persons with Disabilities, to the human rights model. Every state that has signed and ratified the Convention has made efforts to harmonize national legislation in accordance with the latter model. In this article we intend to analyze the evolution of Romanian legislation in the direction of adopting the human rights model, highlighting the development of laws of the past 30 years in the area of protecting persons with disabilities and the dominant model reflected in their content.*

**Keywords:** disability; medical model; social model; human rights model of disability; Romanian legislation

## 1. Introduction

Over the years, various conceptual models of disability have been developed, and at the extremes we find the medical and the social model (Palmer & Harley, 2012, p.358; Haegele & Hodge, 2016, p.193).

From the perspective of the *medical model*, disability is a direct consequence of a medical condition. The reduction of the ability to participate in the life of society is due to the medical condition and requires actions in the direction of prevention, treatment and rehabilitation (De Beco et al., 2019; Mitra, 2018). For these reasons, disability is a decontextualized individual issue (Skarstad, 2022), and the difficulties faced by people with disabilities of any kind are independent of the sociocultural, physical or political environment (Brittain, 2004, p. 430).

This model has a strong normative character. The political implications of adopting the medical model will consist in the concern for providing medical and rehabilitation services (Mitra, 2018, p. 20). Usually, this materializes in the institutionalization of persons with disabilities, their placement in rehabilitation centres under the supervision of medical staff or in an educational context, as well as enrolling children in specialized education establishments (Palmer & Harley, 2012).

The main criticisms of the medical model are directed at the power with which medical staff are invested, as genuine important guardians of society, who diagnose and label, with an impact on the right to specialized services (Haegele & Hodge, 2016). Another criticism targets the negative perception of disability (Haegele & Hodge, 2016), as discriminatory (Skarstad, 2022), the "tendency to regard disabled people as 'having something wrong with them' and hence [as] the source of the problem" (Oliver, 2009, p. 44).

From the perspective of the *social model*, disability is "a product of societal organization" (De Beco, 2021, p. 30). This time, disability is no longer seen as an attribute of the individual but as a socially created problem (Fina, 2017, p. 95). This model is "a structural and social approach, emphasizing barriers and oppression"

(Shakespeare, 2014, p.74). Consequently, the drive to correct, to rehabilitate, will no longer focus on the individual, but instead on the social environment in which said individual is living. According to Morris, public policies that legislate the removal of environmental barriers along with a supportive attitude on the part of general population could solve many of the problems associated with disability (Brittain, 2004, p. 431). In Oliver's (2009) view, there are three general aspects of the social model: (1) the model tends to focus on environmental issues and disabling cultural barriers and not on the functional limitations of people with disabilities; (2) it refuses to see specific problems in isolation from the totality of disabling environments and (3) addressing this model does not mean that individual interventions in the lives of people with disabilities are not helpful.

The social model has influenced the formulation of the main international instruments for supporting the rights of persons with disabilities. Thus, it is reflected in the provisions of Article 1 of the Convention on the Rights of Persons with Disabilities (De Beco, et. Al., 2019, p.6) which states that “persons with disabilities include those who have long-term physical, mental, intellectual or sensory impairments which in interaction with various barriers may hinder their full and effective participation in society on an equal basis with others”. Apart from the Convention, the social model has resulted in a reformulation of the current International Classification of Functioning, Disability and Health-ICF of the World Health Organization (Palmer & Harley, 2012, p. 362).

Even in the situation of the social model, criticism did not take long to appear. A first target is neglecting disability as an integral part of the disability experience; thus, critics say, the model does not fully take into account the experience of people with disabilities (Palmer & Harley, 2012). Another criticism focuses on the fact that this model does not take into account the differences between persons with disabilities (Haegele & Hodge, 2016).

*The medical model versus the social model.* The literature shows that the medical model has lent disability a negative, stigmatizing meaning, while the social model has favoured the strengthening of the civil rights of marginalized persons with disabilities and the elimination of disabling barriers (Dawn, 2021). Haegele and Hodge (2016) highlight a few contrasting aspects regarding the two models. A first difference is related to the conceptualization of disability. While the medical model approaches disability as an individual, medical phenomenon, which determines limited, deficient functioning, the social model conceptualizes disability as a social construct. The latter model is believed to have led to marked changes in paradigms, limited not only to the definition of disability but instead involving various expressions and manifestations related to disability (Dawn, 2021). A second contrasting element noted by Haegele and Hodge concerns the objectives of treatments and interventions. From the perspective of the medical model, the focus of treatment is on *remedying the disability* or on normalizing the individual, while the social model is more focused on *changing society*. Another distinguishing feature between the two models is the act of labelling and classifying individuals. The labelling and classification process is specific to the medical model, while the social model addresses disability as diversity. A final distinguishing feature is correlated with cognitive authority. Whereas in the medical model the cognitive authority for the discourse of disability is represented by physicians and scientists who have the ability to define and cure lesions and diseases, the social model

is described as a liberating force for people with disabilities. Degener argues that the medical model of disability is based on two assumptions: a) *disabled persons need to have shelter and welfare*, which may legitimise the separation of people with disabilities from society through institutionalisation or through education in specialised establishments, and b) *impairment can foreclose legal capacity*, which has led to the creation of laws on mental health and guardianship that take an approach of the incapacity of disability. These assumptions are considered to have a dangerous impact on human rights (Degener, 2017, p.42).

With the Convention on the Rights of Persons with Disabilities (CRPD), it is appreciated that the approach to disability has evolved into a third model, called *the human rights model of disability*. The influence of the social model can be felt in the articles of the Convention (Palmer & Harley, 2012; De Beco, et. Al., 2019), but according to Degener "the CRPD goes beyond the social model of disability and codifies a human rights model of disability" (2017, p. 42). Even the CRPD board has underlined that the Convention "embodies a 'human rights-based model of disability' and an inclusive definition of disability, encompassing all persons with disabilities" (Fina, 2017, p.98). The CRPD's human rights-based model of disability is "an elaboration of the 'social model of disability' which emphasizes how social and structural barriers, rather than the impairment, lead to exclusion" (Skarstad, 2022, p. 98). The presence of this model is appreciated as representing "a milestone in society's move toward recognizing people with impairments as rights holders" (Gordon et al., 2018, p. 508).

According to Degener (2017a; 2017b), the human rights model differs from the social model in at least six ways: (1) the human rights model ensures that no person with disabilities is denied legal capacity; (2) it goes beyond the rights of non-discrimination and includes first and second generation human rights; (3) it recognizes that disability matters in the lives of people with disabilities; (4) it recognizes that identity is made up of different layers; (5) it provides a roadmap for a non-discriminatory preventive health policy; (6) it provides a roadmap for the inclusive development of people with disabilities and for humanitarian aid. But what should not be overlooked is the fact that the human rights model is close to the social model as it also views disability as socially constructed; however, what the human rights model adds to the previous model is that "persons with disabilities have the same rights as others and as such it creates a human rights-based framework for understanding and solving the challenges and discrimination that persons with disabilities face" (Skarstad, 2022, p. 99, footnote 10).

In addition to the above, the literature in the field refers to other existing models. Of these, De Beco (2021) mentions:

- *the cultural model of disability* emphasizes different communities of people with disabilities (thus contrasting with the individual model because it does not focus on the individual, and with the social model because it does not focus on society either);
- *the minority group model of disability* sees people with disabilities as a minority group alongside other groups of marginalized people;
- *the Nordic relational model of disability* emphasizes the relationship between the individual and the environment.

We could mention here also the *difference model of disability*, which brings "an alternative understanding of disability by providing an affect-based framework that eliminates the premise of blame. This conceptualization of disability provides a new approach to vocational rehabilitation" (Breen & Forwell, 2020, p. 12).

As far as we are concerned, we have set out to have a clarification in particular of the first three conceptual models, which currently dominate the debates on the approach to policies in the field of protecting people with disabilities, so that later we can focus on how they have been reflected in the Romanian legislation over the past 30 years. Next we shall detail the methodology and the results of our analysis.

## 2. Research methodology

The aim of our research was to analyze the evolution of laws in the area of protecting persons with disabilities and to highlight the dominant model of approach to disability reflected in the Romanian legislation of the last 30 years.

We chose to analyze the specific and non-specific normative acts for the disability issue from January 1992 to February 2022, that were relevant for our study. The databases used for data collection were mainly the online platform of the Official Gazette of Romania and the official websites of the following central institutions: the Ministry of Labour and Social Solidarity; the National Authority for the Protection of the Rights of Persons with Disabilities; the Ministry of Family, Youth and Equal Opportunities; the Ministry of Justice and the Ministry of Health.

We have used *qualitative content analysis* in order to process the data. According to Drisko & Maschi, "some models of qualitative content analysis begin with an orienting theory or evaluation question that allows the deductive development of at least some of the codes used in the study. In deductive coding, prior empirical research and theory are employed to derive some categories" (2016, p.106). We chose to use this method because, unlike quantitative content analysis, it allows the movement "farther into the field of interpretation than quantitative content analysis in that there is an effort to understand not only the manifest (e.g., frequencies and means), but also the latent content of data" (Sandelowski, 2000, p. 338). In our case, it was, more precisely, directed content analysis, and it had as a starting point the three theoretical models related to disability described above. Directed content analysis involves "the use of more analytic codes and categories derived from existing theories and explanations relevant to the research focus. In this case, the investigator will immerse himself or herself in the raw data, using these themes and those that may emerge from the data itself. The code categories reflect the meanings and expectations inherent in the theoretical framework that the researcher has adopted in order to view the study" (Lune & Berg, 2017, pp. 183-184). Our analysis was guided by the three theoretical models presented in the introductory part of this article. The classification and analysis of the documents was carried out in accordance with the model proposed by Rimmerman et al. (2015).

## 3. Data analysis

The results of our analysis indicate a significant evolution in the definition of persons with disabilities contained in Romanian legislation, starting from the first specific law focused on the protection of persons with disabilities (Law no. 53/1992) to the most recent regulation (see Table 1). This path indicates a shift from the approach specific to the medical model to an approach characteristic of the social model and by extension to the human rights model.

**Table 1: Defining disabled persons in the legislation of the past 30 years**

	Normative Act	Definition
D.1	Law no. 53 of 1 June 1992 on the <i>special protection of disabled persons</i>	"persons who, <i>due to sensory, physical or mental deficiencies</i> , cannot integrate totally or partially, temporarily or permanently, through their own possibilities, in the social and professional life, requiring special protection measures".

D.2	Emergency Ordinance no. 102 of June 29, 1999 on the special protection and employment of disabled persons	"persons who have a disadvantage <i>due to physical, sensory, mental or mental deficiencies</i> , which prevent or limit their normal and equal access to social life, according to their age, sex, to social, material and cultural factors, requiring special protection measures for their social integration".
D.3	Law no. 519 of July 12, 2002 for the approval of the Government Emergency Ordinance no. 102/1999 on the special protection and employment of disabled persons	"persons whose <i>social environment</i> , unadapted to their physical, sensory, mental, mental deficiencies, totally impedes or limits their access with equal opportunities to social life, according to their age, sex, material, social and cultural factors, and who require special protection measures in support of their social and professional integration".
D.4	Law no. 448/2006 on the protection and promotion of the rights of disabled persons (basic, unconsolidated form)	"persons who, <i>due to physical, mental or sensory disorders</i> , lack the skills to carry out normal activities on a daily basis, requiring protective measures in support of recovery, integration and social inclusion".
D.5	Emergency Ordinance no. 84 of September 20, 2010 for the amendment and completion of Law no. 448/2006 on the protection and promotion of the rights of disabled persons	"persons whose <i>social environment</i> , unadapted to their physical, sensory, mental, mental and/or associated deficiencies, totally impedes or limits their access with equal opportunities to the life of society, and who require protection measures in support of their social integration and inclusion".

As professor Conțiu Șoitu states, "legal definitions, included in legislation, have the most significant economic and social implications, because when correlated with the rules for categorising degrees of disability and handicap, they do or do not grant access to welfare payments or social services" (2020, p.80). This could be a first argument for the effort to revise the definitions given to people with disabilities over the years. A second argument could be given by the concern to be more connected "to a reality and to scientific/professional communities that go beyond the borders of the country" (Șoitu, 2014, p.125).

### 3.1. The medical model reflected in the Romanian legislation

The first specific laws developed in the post-December period in the area of protecting people with disabilities have an approach characteristic of the medical model. The definition attributed to persons with disabilities by Law no. 53 of 1992 *on the special protection of disabled persons* shows that they cannot integrate into social and professional life by their own means and instead require support through special protection measures. The situation of difficulty in which people with disabilities find themselves is due to their sensory, physical or mental deficiencies (see Table 1).

Later on, in 2006, we find in the content of Law no. 448/2006 on the protection and promotion of the rights of disabled persons, the same approach specific to the medical model. Although previously, in the period 2002-2006, laws were enacted to define people with disabilities in a manner specific to the social model, and although Law 448/2006 announces in its very title the interest for supporting the rights of people with disabilities, the definition attributed to this group vulnerable again emphasizes their physical, mental or sensory *ailments*, their *lack of ability* needed in order to carry out daily activities, and even the necessary support for *recovery* (see table 1).

The Nomenclature of social services approved by Government Decision no. 539/2005 and later 867/20015 provides for the organization of *recovery* and rehabilitation centres for

adults with disabilities. This focus on recovery activities with people with disabilities remained present in the Romanian legislation until 2019. By default, the quality standards for social services organized for people with disabilities included the concept of recovery. Order no. 559/2008 on the *approval of specific quality standards for residential centres, day centres and assisted living for adults with disabilities* provides that an individual recovery program be developed for each beneficiary of day or residential centres. The recovery activities provided in this law aim to “restore their original state of health and functionality, on two coordinates: rehabilitation, which involves restoring altered morphofunctional structures, and habilitation, which aims to train unaffected structures in order to create and strengthen behaviours and new skills, equivalent to the deficient ones”. Order no. 67/2015 on the approval of the *Minimum Quality Standards for the accreditation of social services for adults with disabilities* provides that each residential centre must provide recovery / rehabilitation programs in order to maintain or improve the functional autonomy of the beneficiary. The expected results are for the beneficiaries to maintain or improve their physical, mental and sensory abilities that will allow them to live a more autonomous life.

### **3.2. The social model reflected in the Romanian legislation**

In the text of Law no. 519 of July 12, 2002 for the *approval of the Government Emergency Ordinance no. 102/1999 on the special protection and employment of persons with disabilities*, we already notice a trend in the orientation towards the social model. This time, the social environment, not adapted to the physical, sensory, mental, mental deficiencies totally prevents them or limits their access with equal chances to the social life (see table 1). However, not all subsequent normative acts reflect this approach. An example in this sense is the Government Decisions for the approval of the national strategies in the area of protecting persons with disabilities drafted in the period 2002-2005, and later Law 448/2006 (basic form).

Some normative acts have a mixed approach. They are moving towards the social model by defining disability in a manner specific to the social model, but their content still betrays the influences of the medical model. For example, Government Decision no. 1215 of October 31, 2002 for the *approval of the National Strategy on Special Protection and Social Integration of Persons with Disabilities in Romania* defines disabled persons as “those persons whose *social environment*, unadapted to their physical, sensory, mental, mental disabilities, totally impedes or limits their access with equal opportunities to social life, according to their age, sex, to material, social and cultural factors, and who require special protection measures in support of their social and professional integration”. However, it states that social protection includes “all the actions taken by society to reduce or even eliminate the consequences that the deficiency causing disability (considered a social risk factor) has on the standard of living of the disabled person.” There is therefore a discrepancy between the two elements, as observed by Professor Liviu Manea in 2006, which indicates an oscillation between the two models: the medical and the social one. Another example is Government Decision no. 1175 of September 29, 2005 on the *approval of the National Strategy for the protection, integration and social inclusion of people with disabilities in the period 2006-2013*, in which we find again a definition specific to the social model, but we also find references to individual rehabilitation and to social integration programs. Here rehabilitation is understood as including “measures to restore and / or compensate for the loss / absence or limitation of certain functions. Rehabilitation includes recovery that is predominantly medical in nature.” We shall provide one last significant example, although the list could be much longer. GEO no. 84 of September 20, 2010 for the *amendment and completion of Law no. 448/2006 on the protection and promotion of the rights of persons with disabilities* provides an essential change in the definition of persons with disabilities (which ultimately aligns with the social model, see table 1), but the references to the individual recovery plan for children with disabilities continue to feature in it.

Starting with GEO no. 51 of June 30, 2017 for the *amendment and completion of certain legal norms*, we find regulations for replacing the notion of “recovery” in the contexts associated with

people with disabilities, a significant indication of the influence of the social model. Thus, it is provided that in the entire content of the specific law for the protection and promotion of persons with disabilities (Law 448/2006) the phrase "recovery plan" to be replaced with the phrase "habilitation-rehabilitation plan". Subsequently, by GEO no. 69/2018 of July 17, 2018 for the *amendment and completion of Law no. 448/2006 on the protection and promotion of the rights of persons with disabilities*, recovery and rehabilitation centres for persons with disabilities are renamed habilitation and rehabilitation centres, and the centres for training for independent living become centres for independent living. Gradually, the same changes apply to other regulations: G.D. no. 476/2019 changes the name of the recovery centres provided in the Nomenclature of social services, with the subsequent influence on the quality standards for the services organized in support of people with disabilities. Thus, instead of the functional recovery / rehabilitation services offered to persons with disabilities in residential centres as per Order no. 67/2015, the new quality standards approved by Order no. 82/2019 provide habilitation / rehabilitation services. The centres "ensure conditions for maintaining / developing the autonomy and potential of the beneficiaries". And the intended outcome is that the beneficiaries are provided with "personalized services for maintaining or developing their functional potential".

The deinstitutionalization of people with disabilities is a concern reflected in more recent normative acts. GEO no. 69 of July 17, 2018 for the *amendment and completion of Law no. 448/2006 on the protection and promotion of the rights of disabled persons* provides "speeding up the process of transition from the institutionalized system to services integrated in the community, taking into account the fact that the deinstitutionalization process is a priority for the system protecting adult persons with disabilities, while diversifying the actions to prevent institutionalisation and to support living in the community". However, research in the field of social policies aimed at identifying the factors that can contribute to the reduction of institutionalization proves to be a challenge (Motoi, 2020, p.288). The same normative act, previously mentioned, recognizes that "failure to ensure the framework for the full exercise of the rights of persons with disabilities, including independent living and integration into the community, respect for dignity and non-discrimination, constitutes serious negative consequences." Such legislation indicates a paradigm shift, a significant distancing from the medical approach, and a shift from the individual and social model to the human rights model.

### **3.3. The human rights model**

Law 448/2006 on the *protection and promotion of the rights of disabled persons*, republished with subsequent amendments and completions is the main regulation that illustrates both the rights of persons with disabilities and the obligations of public authorities to facilitate the observance and access to these rights.

However, we are also interested in examining non-specific laws in order to analyze the manner in which the rights of persons with disabilities are reflected in these normative acts. Law no. 254 of July 19, 2013 *on the execution of sentences and measures of deprivation of liberty ordered by the judiciary during the criminal process* prohibits any form of discrimination on the grounds of language, religion, disability, etc. and provides for people with disabilities conditions for "participation in educational, cultural, therapeutic, psychological counselling and social assistance, moral-religious activities appropriate to their needs and personality, depending on their options and abilities." Regarding accessibility, we find in Law no. 304/2003 *on universal service and users' rights regarding electronic communications networks and services* provisions for ensuring access for persons with disabilities to public telephone services under conditions equivalent to those enjoyed by other users. Law no. 95/2006 *on health care reform* provides for the accessibility of information for people with disabilities (electronic media and accessible format). Law no. 274/2006 for the *approval of the Government Emergency Ordinance no. 19/2006 on the use of the Black Sea beach and the control of activities carried out on the beach* stipulates that beach must be equipped with access ramps for people with disabilities. Law no.

103/2014 for the *amendment and completion of the Audiovisual Law* mentions that “people with hearing impairment have the right to access audiovisual media services, depending on the available technological possibilities”. Law no. 98/2016 on *public procurement* and Law no. 99/2016 on sectoral procurement stipulates that for all acquisitions intended for use by individuals “the technical specifications are defined so as to take into account the accessibility requirements of persons with disabilities or the design concept for all categories of users.” GEO no. 51/2017 for the *amendment and completion of some regulations* stipulates the obligation of the local public administration authorities to include representatives of non-governmental organizations of persons with disabilities in the boards for the reception of construction or adaptation works. Law no. 15/2019 for the *amendment and completion of Law no. 8/1996 on copyright and related rights* indicates that it is allowed to adapt works in a format accessible to persons with disabilities.

Law no. 69/2000 on *physical education and sport* stipulates the obligation of public administration authorities to ensure the conditions for people with disabilities to practice physical education and sports in order to “develop their personality and integrate into society, as well as develop the means to enable the participation of athletes with disabilities in specific national and international competitions”. Government Decision no. 596/2021 for the *approval of the National Air Transport Facilities Program* provides that airport operators and airlines shall ensure equal access to air transport for passengers with disabilities and for those with reduced mobility.

As De Beco (2019) argues, participation in the general education system is a right, not a form of welfare, and the right to inclusive education involves a number of legal obligations on the part of states. GEO no. 51/2017 for the amendment and completion of certain regulations brings amendments, among others, to Law 448/2006 and places in the foreground the education of persons with disabilities in mainstream establishments. It also provides support measures for their integration: “children and young people with disabilities and / or special educational needs, integrated into mainstream education, receive educational support through assistance and itinerant teachers, on a case-by-case basis.” Indeed, the previous regulations also mentioned the option of integrating children with disabilities into mainstream education, but the first letter of the paragraph listing the forms of access to education stated “special education”. Of course, the right to education as a significant component of human rights (Morariu, 2007) is regulated in the Romanian system by specific laws.

Regarding the participation on the labour market, legislative provisions have been identified regarding the accessibility of employments. *Youth Law* no. 350/2006 stipulates the responsibility of the state for ensuring appropriate conditions for the professional integration of young people with physical disabilities (unfortunately, only this type of disability is mentioned), but later on, in specific laws such as Law 448/2006, we find more explicit regulations. We have also found regulations that incentivise employers to conclude employment contracts with people with disabilities (Law no. 76/2002 on the unemployment insurance system and employment stimulation), but also normative acts that constrain the employment of persons with disabilities. Such a measure emerged as early as 1992, in Law no. 57 on the *employment of disabled persons*. According to this regulation, “legal entities with a number of over 250 employees have the obligation to employ a percentage of at least 3% of disabled persons. The legal person that refuses to include disabled persons in the mentioned percentage must contribute to the Risk and Accident Fund, established under the Law on Special Protection of Disabled Persons, the amounts related to the number of disabled persons it does not employ, at the level of the minimum gross salary per month.” Considering the need to adapt to a constantly changing labour market (Medeleanu, 2016), over time these provisions have been extended to other categories of employers, as reflected by the regulations drafted subsequently. Also, job protection has been seen as an effective social policy to stimulate employment (Medeleanu, 2013). For this reason, an existing option in the legislation in force for employers who fail to conclude employment contracts with people with disabilities is to



purchase products and services on a partnership basis from authorized protected units as the balance of 50% of the amount due to state budget (introduced by Law no. 81/2021 on *the approval of Government Emergency Ordinance no. 60/2017 amending and supplementing Law no. 448/2006 on the protection and promotion of the rights of persons with disabilities*).

The most recent legal regulation that reflects a specific approach to the human rights model is the Decision of the Romanian Constitutional Court no. 601 of July 16, 2020 regarding the exception of unconstitutionality of the provisions of art. 164 para. (1) of the Civil Code. This article stated that "a person who does not have the discernment necessary to take care of his/her interests, due to insanity or mental weakness, shall be placed under judicial interdiction." The argument in favour of the Court decision was the fact that "the measure of placing under judicial interdiction regulated by art. 164 para. (1) of the Civil Code is not accompanied by sufficient guarantees to ensure respect for human rights and fundamental freedoms". Whereas, as a result of the JRC Decision, the provisions of that article have ceased to have legal effect on 13 March 2021, the National Authority for the Rights of Persons with Disabilities, Children and Adoptions (currently the National Authority for the Protection of the Rights of Persons with Disabilities), as the central body coordinating the activities of protection and promotion of the rights of persons with disabilities, has been designated to regulate the legislative framework regarding assisted decision-making. The president of ANDPDCA stated at that time in a message posted on the official website of the institution ([www.andpdca.gov.ro](http://www.andpdca.gov.ro), 28.01.2020), that this was a turning point in the history of people with disabilities in Romania, which marked a major step forward in respecting their dignity".

Currently, the general legislative framework governing the protection of the rights of persons with disabilities includes:

- the Romanian Constitution, revised;
- the UN Convention on the Rights of Persons with Disabilities (CRPD), ratified by Romania by Law no. 221/2010;
- Law no. 448/2006 on the protection and promotion of the rights of disabled persons, republished;
- Law no. 292/2011 on social work.

#### **4. Conclusions**

The results of our analysis highlight three stages in the evolution of Romanian legislation in the area of protecting persons with disabilities. The first stage, which covers the legislation drafted between 1992 and 2002, is dominated by the presence of the medical / individual model. In the second stage, where we include the normative acts that appeared between 2002 and 2018, a mixed approach is outlined, an obvious oscillation between the medical and the social model. In the third stage we consider the adoption of the human rights model. Undoubtedly, tendencies towards adapting the Romanian legislation to the human rights model had emerged as early as the signing of the CRPD. But only starting with 2019, we have seen a more convincing orientation towards this model, with the entry into force of certain laws that regulate significant changes in the concepts associated with disability. If we consider Degener's assertion that "the human rights model ensures that no person with a disability is denied legal capacity" (2017, p.56), probably the most significant step towards a human rights-based approach took place in 2020, with the issuance of the Constitutional Court of Romania Decision no. 601 of July 16, 2020 regarding the exception of unconstitutionality of the provisions of art. 164 para. (1) of the Civil Code, which we mentioned earlier in this article.

For the human rights model to be observable in the practice of those who interact with people with disabilities, we believe it is necessary to effect changes at institutional level as well.

Change in institutions, as a rule, as C. Morariu (2013) argues, can be encouraged through continued interactions between social, economic, political and civil society actors.

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# THE INFLUENCE OF THE FAMILY ENVIRONMENT ON THE PROCESS OF DEVELOPMENT AND SOCIAL INTEGRATION OF THE INDIVIDUAL

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## **Abstract**

Today's Romanian society faces many economic and social problems, interconnected in a subtle way, difficult to detect through a superficial approach. The need to know and understand the correlative mechanisms presupposes scientific approaches to coherent research of the phenomena that directly affect us. In this context, of continuous turmoil, economic and moral crises, deviance is a phenomenon that affects the Romanian society both internally, by decreasing the population's trust in institutions, and externally due to the unfavorable image that Romanians have in other countries. of the European Union. Although at first sight there is a tendency to consider that poverty and underdevelopment are causes of juvenile delinquency and delinquency, we consider that the determining factor is that of a crisis of the family institution and lack of education. In this article, we will analyze the mechanisms by which the family, as a social institution and socializing agent, contributes to the social integration of the individual and to the achievement of social control.

**Keywords :** family, social integration, social control, deviance, aggression.

## **1. The functions of the family as a social institution**

The family group is an essential factor in the development of the human being as a social being, being the main agent of the primary socialization process, a process that takes place in the first 7 years of life and results in transforming the human individual into a member of society (Otovescu, p .230). The family is defined by I. Mitrofan (1989) as the center of human organization and the origin of all functions of society where processes such as reproduction, livelihood, education, training and integration of new members take place, guaranteeing the long-term continuity of some moral and spiritual beliefs and values. According to the McMaster model (Ryan, Epstein, Keitner, Miller, & Bishop, 2005) the family forms a system in relation to other systems: the extended family, the workplace, the community of believers, and the school or workplace social environment, which which means that the dynamics within the family can only be analyzed within an overall interaction.

The social environment, especially the family, bases certain moral and cultural norms on the basis of personal beliefs and feelings that end up forming new followers who share them. Karen Horney says social media, which is based on destructive and toxic principles, has the ability to convey the belief system she practices much more easily, thus hindering members, especially teenagers, from developing into so as to reach their higher potential (Colin, Benson, Grand, Weeks, Meerin, & Ginsburg, 2015, p. 110).

By imagining the family as a system, the authors of the model emphasized that its functioning cannot be analyzed and understood by separately analyzing the detached parts of the whole, but it is necessary to shift the emphasis on family

structures, connections, organization and roles. Only in this way can we fully understand the behavior of each member, taking into account its role, the factors of influence and the patterns that are traded between the members of the system (Ryan, Epstein, Keitner, Miller, & Bishop, 2005, p. 24). According to the model, in order to understand the family and its functioning, six dimensions of equal importance in the conceptualization of behavior within the family must be analyzed: problem solving, communication, roles, emotional responses, emotional involvement and behavior control. (2005, p. 26)

Problem solving is the ability of the family to ensure its own functioning by addressing issues that threaten the integrity of the family. Family problems fall into two categories: instrumental and emotional. The first category refers to the organization of financial resources and ensuring the necessary conditions for living, food, housing, etc., while the second category represents problems generated by negative emotions such as anger or depression. Ryan & al. (2005) found that families who face instrumental problems, and who remain unresolved for a long time, often fail to address emotional issues effectively, while families with emotional problems are able to to a greater extent to solve instrumental material difficulties.

In reality, many of the concrete problems that families face do not fall into just one of two categories, but have both material and emotional aspects. The McMaster model identifies a number of steps in effectively solving these problems, namely: identifying the problem (involving finding a pattern of problem behavior and defining the type of problem, whether emotional or instrumental), discussing the problem with the right people, and developing alternatives. by formulating plans appropriate to the nature of the problem, it is important to avoid planning for a single solution. Next, there is the decision-making stage based on the evaluation of alternative plans, at this stage it is vital to correctly inform all the people involved. Added to this is the decision-making stage, the monitoring of the action through a verification mechanism and, finally, the evaluation of the efficiency and the way in which the problem-solving process took place. In the last stage, it is important to be aware of mistakes and the correct answers to problems so that solving future difficulties is much easier (2005, p. 28). Families have a range of problem-solving skills that can range from a systematic approach, specific to families with no or few unresolved issues, to less effective approaches that involve the inability to identify the problem or find answers that involve violence, prejudice, or committing crimes.

The next dimension is that of communication. This involves the verbal exchange of information that takes place within a family and is characterized by two categories, clear versus masked continuum and direct versus indirect continuum. The first classification refers to the way the message is expressed, while the second to its target. The way of communication in a functional family must be clear and direct (Roşeanu, Decsei-Radu, & Țirtea, 2011, p. 75).

Roles are role models for the behavior of family members that correspond to the obligations they assume. The American psychologist Virginia Satir considers that in a healthy family environment the roles are openly assumed and involve manifestations of affection, positive appreciation and the necessary protection, while in a dysfunctional family, family members tend to adopt some roles. personality that compensates for the lack of ability to openly express their affection. The roles identified by Satir are the accuser who is represented by the family member who constantly

criticizes others, the disaffected intellectual, the peacemaker who constantly apologizes, the one who distracts from emotional issues and the harmonizer who communicates openly, directly and seeks ways to reconcile with conflicting members. Apart from the role of harmonizer, the others indicate certain problems of the members it adopts, namely lack of self-confidence, fear of disapproval and inability to recognize emotions. These roles, while providing a model that allows the family to function, can be harmful to family members because these roles do not allow them to be themselves. (Colin, Benson, Grand, Weeks, Meerin, & Ginsburg, 2015, pp. 146-147). Unlike Virginia Satir, Ryan et al. (2005) mainly define roles as natural functions. They are concerned with identifying the roles of functional families, identifying the day when they will provide important functions: providing resources, especially material ones, cultivating interest and support, sexual satisfaction, personal development and finally, family maintenance and management (Roșeanu, Decsei-Radu, & Țirtea, 2011, p. 76).

The next dimension, that of emotional responsiveness, refers to the range of emotional reactions of family members that can be divided into affections that express well-being and that consist of affection, warmth, tenderness, love, consolation and happiness, respectively, the urgent emotions among which it includes depression, disappointment, fear, sadness, and anger. Affective involvement refers to the extent to which family members are involved in an activity performed by one of them. Ryan et al. (2005, pp. 35-36) identify six types of affective involvement: lack of self-interest, lack of sentimental involvement, narcissistic or egocentric involvement, empathic involvement, over-involvement characterized by over-protective and intrusive behaviors, and finally, symbiotic or intimate involvement. Empathic involvement is the only type of healthy involvement. The last dimension is that of behavior control and refers to the models adopted by the family in situations that represent a physical danger, in situations that involve needs and psycho-biological instincts but also in those situations that involve socialization, both outside the family and in interior. This dimension is defined by the formulation of rules of conduct, the setting of standards that adults impose on children or expect from other adults, and the imposition of discipline in relation to children.

The McMaster model focuses on transactional, organizational, and structural patterns in characterizing family behavior rather than intrapsychic variables. Among the main causes of the development of dysfunctional family behavior is divorce or separation between parents, studies showing that antagonism between them directly influences the behavior of children (Ryan, Epstein, Keitner, Miller, & Bishop, 2005, p. 39).

For his part, M. Voinea (2010, p. 814) emphasizes that “ the family is a universal institution, found everywhere and fulfilling the same main functions: transmitting biological and cultural heritage, ensuring material and emotional protection for descendants, forming a climate of development of the personality of all its members ”. In any society, the family has distinguished itself as a specific group characterized by a strong internal weld, maintained both by the action of internal forces and by the pressure of society.

## **2. Parental attachment**

Parental attachment between parent and child that manifests itself in the first years of life, through emotional reactions such as screaming, crying, laughing and other

gestures that attract the parent's attention is a basic indicator of the parent-child relationship for the child and an important predictor of its subsequent behavior. Parental attachment is dynamic and usually reaches its peak in childhood. It may disappear under certain conditions. When the child reaches the age of adolescence, the type of attachment to the family changes both in terms of form, nature or intensity, usually decreasing under the influence of the formation of self-awareness by the adolescent and the accentuation of his individuality (Bejenaru, 2016, pp. 1-2).

The child has a series of behaviors and emotional needs, the neglect of which can lead to adolescence in the form of violent manifestations or other behavioral disorders. The relationship between mother and child is not only about the need for food and protection, but also has a very important emotional side that forms the primary attachment of the child. It is expressed through the search for the mother and the need for her to be present, and the lack of satisfaction of such a need creates a feeling of insecurity that can mark the individual for life. At this stage of childhood, attachment is formed based on the person's closeness and ability to create a sense of security in the child (Savca, pp. 1-2).

Mary Ainsworth identified three types of pre-adolescent attachment based on children's reactions when they come in contact with a stressor. She found that 70% of babies referred to their mothers as a safe base from which to feel free to explore the environment. This meant that children could feel happy even in their mother's absence, as long as she was available whenever they needed her. Another reaction is an anxious-avoidant one that includes children who seem to be indifferent to their parents. Finally, the third type of attachment is the anxiety-resistant nature of children who behave fearfully in relation to unknown elements even in the presence of their mother (Colin, Benson, Grand, Weeks, Meerin, & Ginsburg, 2015, pp. 281). Another type of attachment is the insecure-ambivalent one, characterized by contradictory attitudes such as alternating aggressive manifestation or crying with episodes of happiness. This "false attachment" is associated with a lack of maternal affection and involves a high level of uncertainty on the part of the child regarding the parents' reactions, perceiving their behavior as disruptive or distressing, loss of self-confidence and devaluation of oneself and avoiding attachment to others (Bejenaru, 2016, pp. 6-7).

In the case of adolescents, the attachment to their parents may decrease in intensity due to the appearance of the desire to manifest independence, the development of closer relationships with the group of friends and the attachment to a romantic partner. This phenomenon is largely considered natural and has no significant effect on changes in adolescent behavior. However, in the case of families affected by a divorce, the death of a parent or their migration, parental absence can have a negative effect on the type of attachment developed by adolescents. In the case of divorce, unlike other situations, it has been noted that parents become more authoritarian, and adolescents show a higher level of insecure attachment and a higher incidence of disorders such as anger, self-isolation or depression.

In the case of migration of one of the parents, the roles of children and adolescents change and with them the attachment relationships. When there is an age difference between children left alone, there is a phenomenon called parenting by which one of them assumes the roles of absent parents.

### **3. Family risk factors generating deviant behavior**

Aggressive behavior among adolescents is caused by a number of factors that can be classified into two broad categories: psycho-individual factors such as temperament, negative feelings, mental disorders and low levels of emotional intelligence, and external factors that are generated by education, received, the social and cultural environment. The second category of factors includes the aggressive manifestations of family members towards each other, in relation to the adolescent and towards the outside people, the authoritarian manifestation or the disinterest of the parents, the prolonged exposure to violence in real life or in a setting. virtual.

Although some research shows that constant aggressive behavior during adolescence corresponds to an increased risk of criminal behavior and the manifestation of behavioral disorders in adulthood (Huesmann & Eron, Cognitive process and the persistence of aggressive behavior, 1984), more recent work argues that adolescent aggression is often a benign problem, disappearing with maturity especially in cases where aggressive adolescents have been supported in solving behavioral problems by family, group of friends or school environment (Potirniche & Enache, 2014, pp. 465).

In an attempt to identify the underlying factors of adolescent violence, a number of theories have been developed from those formulated by Dodge (1991; Dodge, Coie, & Lynam, 2006) or Bandura to those developed by Huesman (1988). Huesmann & Eron, 1984) based on research in cognitive psychology that varies in learning-specific behaviors, cues, behavioral perceptions, and perceptual and behavioral inclinations. A common aspect identified by all these theories was the dual nature of the learning process involved in engaging in aggressive behavior: on the one hand, inactive, learned through practice, and on the other, observational, as a result of simple exposure to type of reactions.

A. Bandura started from the behaviorist explanation of learning which was based on the concept of operant conditioning which he rejected, considering that he cannot explain such a complex field as aggression. The hypothesis he developed used both Skinner's concept of operant conditioning and Freud's psychoanalytic explanation for assimilating traits encountered in others. Bandura demonstrated through a series of experiments, the most famous of which was the one with the Bobo doll from 1961, that learning to behave aggressively is not done by consolidating rewards and punishments, but by observing and imitating the manifestations of adults. especially those in the family. In order to assimilate the behavioral pattern of others, the child or adolescent must first pay attention to it, which explains why the shocking or intriguing behaviors end up being imitated to a greater extent than normal. Other conditions identified by Bandura are the adolescent's ability to remember what he saw, his ability to reproduce it, and the existence of a motivation (Colin, Benson, Grand, Weeks, Meerin, & Ginsburg, 2015, p. 288).

Among the risk factors that predispose the adolescent to problematic behaviors and deficient social skills are: the disadvantaged social status of the family, marital conflicts and ignoring the problems that the child has from the parents. As a result of aggressive manifestations, the adolescent may be rejected by the social environment in which he is and have school failures, which predisposes him to join a group of adolescents with the same type of behavioral disorders that allow him to feel accepted.



Unfortunately, the formation of such a group of friends further accentuates his aggressive tendencies, forming a vicious circle.

Galina (Focşa), following the research activity, came to the conclusion that adolescents from disadvantaged families perceive their behavior as less aggressive than in reality, and those from functional families tend to overestimate the level of aggression they show. This perception is due to the way they define aggression and the values it offers. Those in dysfunctional families who live in an aggressive, hostile environment are more inclined to view violence as natural and are unaware that their behavior may be perceived as aggressive by others.

Factors that favor the development of anxiety and accentuation of aggressive behavior are, in addition to those mentioned above, the anxious parental pattern, taken by children by imitation, maternal hyperprotectiveness, the existence of a rigid system of beliefs and values within the family, favored by religious or cultural formation. . Also, excessively rigid family rules such as "black and white" thinking, suppression of feelings, substance addiction of parents, absence of one or both parents following divorce, death or migration, difficulties of parents in correctly assessing the facts of their children, Excessive criticism of one of the family members and family secrets are other factors that could lead to the generation of such behaviors (Focşa).

Adolescents exposed to physical violence end up developing violent behavior towards people of the same age or younger, manifest antisocial personality traits and tend to engage in criminal activities. Neurological research has shown that such exposure to physical aggression alters the structures involved in regulating emotions. Violence between parents affects adolescents, who will later risk developing an insecure attachment to the former. Adolescents tend to form an unpleasant opinion of the abused parent and in turn perpetuate acts of undermining other people or the abused parent.

In families where parental abuse is practiced, the aggressive behavior of children becomes more difficult to control because the adult victim loses authority and tends to transfer negative feelings such as anxiety, insecurity, and dissatisfaction to the child. It is also possible that the aggressor adult may become so ugly and feared by the adolescent to such an extent that a healthy emotional relationship with him can no longer be established. Parental violence against a minor in the form of sexual violence can affect the formation of personality, leading to difficulties in developing emotional and emotional attachment and the development of feelings of helplessness, fear or disgust towards oneself. This will usually give rise to forms of aggression directed at oneself by suicide attempts or acts of self-mutilation to which the adolescent resorts in order to escape suffering.

Also, the conflicting family climate in which parents show hostility towards their children, both in terms of relationships and education, can lead to arrogant, aggressive and vindictive behavior on the part of minors, who imitate the parents' model as a sign of distrust. own person (Savca, p. 455).

Separation of children from their parents for various reasons may be due to their parents' divorce or death. In the first case, that of divorce, the conflict situations that arise are due to the fact that the parents try to denigrate each other, trying to develop in the child an attitude of hostility towards the other partner. Another situation that can arise during the divorce after the end of the game for the custody of the child is that the minor ends up being neglected because the adult will focus on his own suffering.

As a result, the adolescent shows anger or commits crimes in order to gain the attention of one or both adults, but also to make the parents re-establish their relationship following the collaboration meant to solve the problem that the adolescent created.

In the second case, in which the parent died, the adolescent may go through a process of mourning in which the following ten emotional states are recognized: the state of shock, the denial of reality, the search for the deceased, the desire to be around to the loved one who is no longer in their life, sadness, anger, guilt, anxiety, expectation and acceptance. In a functional family, the surviving members provide support to the adolescent in order to reach a better, balanced state, while in a dysfunctional family, the adolescent is left to solve his own suffering and anger. This means that he will take refuge in situations marked by drug use, alcohol, truancy, aggression and hostility towards others (Bucur, Ursoniu, Caraion-Buzdea, Ciobanu, Florescu, & Vladescu, 2020).

Another factor mentioned above is that of alcoholic parents, with mental disorders or a criminal record, in such situations young people feel inclined to use alcohol and other substances in turn, to engage in criminal activities in turn, or to pick up inappropriate language. Studies have shown that in the case of adolescents from families with incarcerated parents, the risk of them committing crimes is six times higher than in the case of adolescents from functional families. Adolescents with delinquent parents find it harder to fit into a group and have difficulty socializing and integrating because of the image they give to their family or because the negative emotions they face incapacitate them to form constructive relationships (Savca, pp. 457).

Inefficient parenting has been most consistently associated with anti-social behavior and aggression. This may include a lack of parental affection, a high level of negativity, a lack of support, all of which lead to a low level of cohesion among family members. Another important factor is the adoption of a rigid and inconsistent discipline, namely the imposition of very high expectations from parents that reduce the adolescent's self-confidence and can be a continuous source of stress. The model of learning through social interaction revolves around the idea that intermittent harshness manifested in response to the child's negative behavior and the existence of inconsistent expectations regarding adolescent behavior contribute to the escalation of an antisocial attitude and the formation of cycles in which aggressive coercion and aggression in response perpetuates each other. Strict sentences imposed by parents can sometimes turn into abuse and can develop in the adolescent, the tendency to become an abuser in turn. (Madelyn & Masten, 2010, p. 6)

In conclusion, witnessing the manifestation or personal experience of violence, especially within the family, affects the ability to process social information in terms of identifying threats, contributes to disrupting the system of responses and conduct in stressful situations, the experience being correlated with bullying. in the school environment or various forms of crime in society. Parents play a critical role in structuring the socialization of adolescents with those around them, in choosing the social environment and by their own example. With age, the development of dysfunctional patterns of family behavior can affect other areas of adolescent life, from romantic relationships to school performance and how they are perceived and accepted in the social environment.

#### 4. Conclusions

The comparison between different regions or between modern societies reveals that there is a high crime rate in countries with a high standard of living or that there are differences in the degree of crime between different communities, with a similar level of development. Aggression, closely linked to deviance and crime, is a topic of great interest to psychology, whose role is to assess the extent of this phenomenon and to explain its individual and group determinants. In recent decades, the perpetuation of aggressive, deviant behavior has become one of the major social problems facing society. A profound and realistic approach to the phenomenon explains aggression as a psychosocial problem that is also caused by other psychosocial problems and is closely linked to the way society, community and family manage resources, education and the functioning of structures and institutions.

Of course, the problem is not only encountered in Romanian society. Aggression among adolescents is a significant problem in many countries and is an important topic of research for psychology and sociology, especially due to its long-term effects (Bucur et al, 2020, p. 1). As early as 3-4 decades ago, studies such as those of Huesmann and Eron (1984) showed that each individual develops a specific level of aggression that remains relatively stable throughout life and is consolidated during childhood and adolescence. . Although lifelong forms of aggression vary with age, sometimes violent behavior can be the result of external factors. Research has shown that overall, the higher the level of aggression in adolescence, the higher the chances that it will remain high during adulthood (Huesmann, 1988, p. 14). In addition to the risk of developing an aggressive behavioral pattern, another long-term negative effect is the difficulty of social adaptation of victims who are subjected to systematic aggression, a phenomenon that can result in dropping out of school, isolation from society or developing a baggage of resentment. can lead to violent manifestations or anti-social behaviors later in life.

Therefore, addressing a topic such as the influence of the family environment on the prevention of aggressive behavior is a topical issue, given the scale of the phenomenon, translated into sociology and legal sciences by concepts such as delinquency and crime, but also the consequences of antisocial behavior on the aggressor, the aggressor and the society as a whole. However, unlike the mentioned scientific branches, the psychological approach emphasizes the individual and group variables that influence or determine the appearance of aggressive tendencies and behaviors.

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# RESILIENCE PROGRAMMES FOR THE MITIGATION OF THE EFFECTS OF ONLINE EDUCATION ON STUDENTS FROM DISADVANTAGED CATEGORIES

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**Abstract:** *One of the first measures taken by the Romanian Government for the mitigation of the extension of the Coronavirus pandemic, in March 2020, concerned the secondary and university educational systems. The suspension of classes with physical participation and their relocation in the online system supposed an infrastructural and competency transition that challenged the Romanian education, beginning with the spring of the educational year 2019-2020. For the population with optimal incomes and an average to high education level, the connection to the online school was made progressively, according to the knowledge and the abilities of the family to facilitate the adaption of the pupil enrolled in the secondary system to the new form of virtual education. For those with low incomes and a low school education level and for the inhabitants of the rural environment or of environments with a poor internet or wireless infrastructure coverage, the connection to the online school was partial or none at all. The short and medium term effects of the absenteeism caused by the COVID-19 pandemic have a direct impact on the cognitive development and on maintaining the interest for education, for the pupils from disadvantaged environments. This communication proposes to analyze the extent of these effects and to identify resilience measures for the configuration of the programmes meant to mitigate them, therefore it shall include a sociological research under the form of a survey based on a questionnaire addressed to families and children from Dolj county that had a poor attendance to online classes.*

**Keywords:** *Coronavirus pandemic, online education, vulnerable students, resilience programmes*

## 1. Introduction

The World Health Organization declared that the Coronavirus outbreak was a Public Health Emergency of International Concern, on January 30<sup>th</sup> 2020 and a pandemic on March 11<sup>th</sup> 2020. The WHO urged all concerned states to implement a containment strategy with the aim of mitigating the effects of the pandemic. As a consequence, on March 16<sup>th</sup> 2020, the president of Romania announced that the country entered the emergency state, for the first time after 1990, in order to make the fight against the spread of the virus more effective and to be able to allocate more funds towards this purpose. 5 days sooner, on the same March 11<sup>th</sup> that the pandemic had been acknowledged at world level, schools had been closed for an initial period of 10 days, which was later prolonged several times. Education was commuted in the online environment, whereas the authorities estimated a number of ca. 250.000 pupils that had no access to the internet, while specialized studies pointed out a real number of 900.000. Authorities were forced to act rapidly and no previous assessment was undergone, in order to identify the real dimension of actual preparation of the pupils and teachers for the implementation of this measure.

The new school year, 2020-2021, began in September, with the physical presence of children in schools, but no sooner than November 9<sup>th</sup>, online-school was adopted again, until February 2021. Altogether, during the first year of the pandemic, children missed school for a total period of almost 7 months, followed by frequent interruptions caused by the emergence of specific cases in a certain class or a number of cases at school level. The effects of these disruptions on students in the pre-university system were soon to be noticed and resented by children themselves, their families and their teachers: delays and poor assimilation of basic skills, learning difficulties, lack of concentration, psychological vulnerability, isolation, marginalization, especially for children in the most disadvantaged social categories. The most affected amongst them were children from families with a low income level and poor intellectual skills, fully or partially unable to provide them with the necessary equipment and/ or educational support. As it had already researched and proven by specialists, “in Romania, the rural environment has been and still is the most affected by the phenomenon of disparities through all its components: schooling, demographic potential, agrarian economy, poverty, health. [...] Therefore, for a Romanian, living in rural areas means being exposed to a risk of extreme poverty three times higher than in urban areas” (Motoi, Popescu, 2017: 111).

As such, the most vulnerable categories of the population became, during the pandemic, even more vulnerable and exposed to social, economic and educational marginalisation.

At present, after two years of pandemic and a few months of normalization attempts, the balance of the educational progress of children in all categories is still negative. Urgent remediation and compensation measures are needed in order to re-establish a favourable evolution and to sustainably address the unfavourable outcomes.

“It is obvious that risks and vulnerabilities trigger social exclusion, but the implementation of the right community building, social assistance and social protection measures triggers the resilience at the level of the community, by empowering its individuals to claim their rights, by educating them and raising awareness about their and their children’s future” (Niță, Pârvu, 2020: 114).

## **2. Key- concepts**

In the conceptual framework of our communication, two major concepts that reflect, highlight and enhance each-other are resilience and vulnerability. Their interaction is analyzed within the context of the COVID-19 pandemic that has been challenging and remodelling our world since the beginning of 2020.

Therefore, we shall firstly point out that a pandemic is “an epidemic occurring worldwide, or over a wide area, crossing international boundaries and usually affecting a large number of people” (Last, 2001). But some researchers further argue that most definitions of pandemic leave out the fact that a true pandemic “occurs when almost simultaneous transmission takes place worldwide” (Kelly, 2011: 240).

As for resilience, it seems that the majority of definitions “are focusing on those adaptive patterns emerged in the context of significant adversities” (Anghel, 2016: 36). While, from the perspective of physics and natural sciences, it means the capacity of a system to integrate the disturbing factor and to reorganize in order to maintain the same function, while being submitted to change, a more *social* definition of resilience underlines the “autonomous initiative [and] recuperation”, the “getting by”, the

protection that ensures survival in circumstances that do not allow changes to the very frameworks that dictate survival (Katz, 2004:242).

As researchers have shown, the mechanism of resilience involves disturbance, which either triggers or is triggered by vulnerability, which is defined as “a human condition or process resulting from physical, social, economic and environmental factors, which determine the likelihood and a scale of damage from the impact of a given hazard (UNDP, 2004: 11). Social vulnerability is measured according to several specific dimensions, as: the level of poverty, lack or limited access to information, technology and other resources or to critical services (sanitation, transportation) etc., vulnerable communities etc. (Cutter et al., 2003).

It has been highlighted by numerous studies and will also be pointed out by our research that poverty is the main trigger for children’s vulnerability when it comes to living, growing and developing according to their needs.

Relative poverty is defined as “the absence of the minimum level of resources that ensures a decent functioning of the person/ family in a given socio-cultural context” (Zamfir, 1995:14).

### **3. Facts**

Most researches in the field of education warn that “when looking at the factors that impede the attainment of foundational learning skills, poverty is the most striking, particularly with regard to reading skills. The likelihood that a child in the lowest wealth quintile has foundational reading skills is 16 percentage points lower than for a child from the highest wealth quintile” (UNICEF, 2021 a).

An analysis performed two months after the first closure of schools in the spring of 2020 (Salvati Copiii, 2020) revealed the immediate impact of the Covid-crisis on the disadvantaged families and children in the rural environment, pointing out that there is a direct connection between the level of poverty and educational progress: 7% of the subjects lost their jobs, 50% of the families had to cut off expenses by 50% (including items necessary for the child/children: clothing, school supplies, educational materials, shoes, hygiene products), 36% were unable to provide necessary food or pharmaceutical products. Less than 20% of the subjects said that they own a PC, laptop or tablet and 9 of 10 persons had access to the internet, but only over a mobile phone (difficult to use in educational contexts). Regarding online education, 42.42% from the analyzed batch of children had no access to online classes, but only to other forms of remote education, support from school or had no access at all. The most parents participating in the study declared that the first month of school closure caused negative effects for their children: isolation, lack of socialization, educational problems, sadness, fear, stress etc. Moreover, for those children that owned an electronic device, the average daily use time increased to 3-4 hours (compared to 2 hours before) and most of the daily free time activities are related to the use of an electronic device.

Another report launched at international level (save the Children International, 2020) estimated that, at the beginning of April 2020, due to the attempt to stop the spread of the Covid-19 virus, ca. 1.6 billion school students at global level (91% of the total number) were not attending school. It was the first time that humanity went through this simultaneous educational disruption.

A national study performed in Romania in May 2020 (IRES, 2020) showed that a significant percentage, of 32% of the children included in the pre-university – school



system in Romania had no access to a device necessary for attending online classes. This percentage was 4 times higher than the one indicated by the Minister of Education at the beginning of May 2020, from the statistics of the Ministry of Education. By this occasion, the Minister also had announced the allocation of 150 million Lei for the acquisition of devices from children in the disadvantaged categories. According to the results of the study, the allocated amount would be insufficient as to cover the needs of equipping disadvantaged children with the necessary devices. Furthermore, the study pointed out that the access to an internet connection that supports online classes is higher in the urban environment than in the rural one (87% vs. 79%). Regarding the participation of teachers in the online-education process, only 64% of the participants in the study declared that their children had online classes daily. The other ca. 30 % organized online classes twice or once a week or none at all. In compensation, more than a quarter of the children in Romania received 4 times more homework than usual, for which 50% of them spend 3 or more hours daily. More than a quarter of the responding parents declared that their children did not receive enough help from their teachers during this period.

The impact of Covid-19 on the education has been a permanent concern since the beginning of the pandemic, especially for the most active international organizations in the field of child protection and child welfare.

A report published by UNICEF at the end of last year (UNICEF, 2021 b) states that “the COVID-19 pandemic has been the biggest threat to children” in the 75 years of existence of the organization. “While the number of children who are hungry, out of school, abused, living in poverty or forced into marriage is going up, the number of children with access to health care, vaccines, sufficient food and essential services is going down”. (UNICEF, 2021 b: 2). From a global and long-term perspective, the report warns that the pandemic crisis could make room for a challenging crisis, in which the objectives of sustainable development could be hard to maintain and the approach of all states should be towards becoming allied in creating reliable recuperation initiatives, in order to prevent increase of marginalization and inequality for disadvantaged children. The key-findings of the report are that: “the COVID-19 pandemic is reversing progress in the fight against poverty”; “(...) it will take at least seven to eight years to recover and return to pre-COVID-19 poverty levels”; “in 2020, over 23 million children missed out on essential vaccines”; “the pandemic has harmed the nutrition, diets and food security of children and adolescents, especially for those living in multiple vulnerabilities”; “COVID-19 has exposed the extent and severity of the mental health crisis” – “in the first half of 2021, 1 in 5 young people reported often feeling depressed or having little interest in doing things”. The report moreover warns that we will not be able to witness the true effects on the children’s mental health for years.

A UNESCO report published at the beginning of the current year (UNESCO, 2022) sums up the results of an extended study performed with the aim of identifying how teaching and learning were affected by the COVID-19 crisis and how the relevant stakeholders responded across the different countries. Although Romania was not included in the study, we consider the results to be representative for our situation as well, given that countries with a similar economic and social development level and similar education systems were amongst the analyzed ones. The conclusions of the study are that: there

was registered a great variation concerning the continuity of teaching and learning; both students and teachers resented a decline in the learning process; students did not benefit from enough help and support; both students and teachers felt overwhelmed by the situation and resented a decrease in their well-being; vulnerable children were the most exposed to being left behind in school progress; the Covid-19 crisis was an enormous challenge for schools, students and teachers and appropriate measures are necessary for recovery and prevention of future similar disruptions.

#### **4. Methodology**

Our research was conducted based on two parallel quantitative surveys addressed to both children and parents from five disadvantaged rural communities in Dolj County, Romania, selected from amongst the marginalized communities identified by an exhaustive study performed by of the World Bank (World Bank, 2016).

The study was performed during September-November 2021, on a batch composed of 50 parents of both genders and regardless of their age and occupation and, respectively, of 50 children aged between 10 and 14 years, enrolled in the secondary education system.

The questionnaires were administered during several meetings organized by each of the five selected schools, where a number of 10 children accompanied by one parent were invited by the class principal teacher to take part.

Both questionnaires included a number of 15 mixed – open, closed and free-answer questions (of which several questions had pre-formulated answers) targeted at revealing the difficulties that the subjects faced during the online-school period.

#### **5. Results**

In the following, we have included the results/ answers for a number of 5 questions from the ones addressed to the children and 4 questions from the parents' questionnaire, which we considered to be most relevant for the subject of our study.

*Survey applied to children enrolled in the secondary system, from marginalized rural communities in Dolj county*

Question no. 1: *Do you have, at home, an appropriate private place where you can attend online classes?*

- YES – 22%
- NO - 88%

Figure 1. The existence of an appropriate space for attending online classes

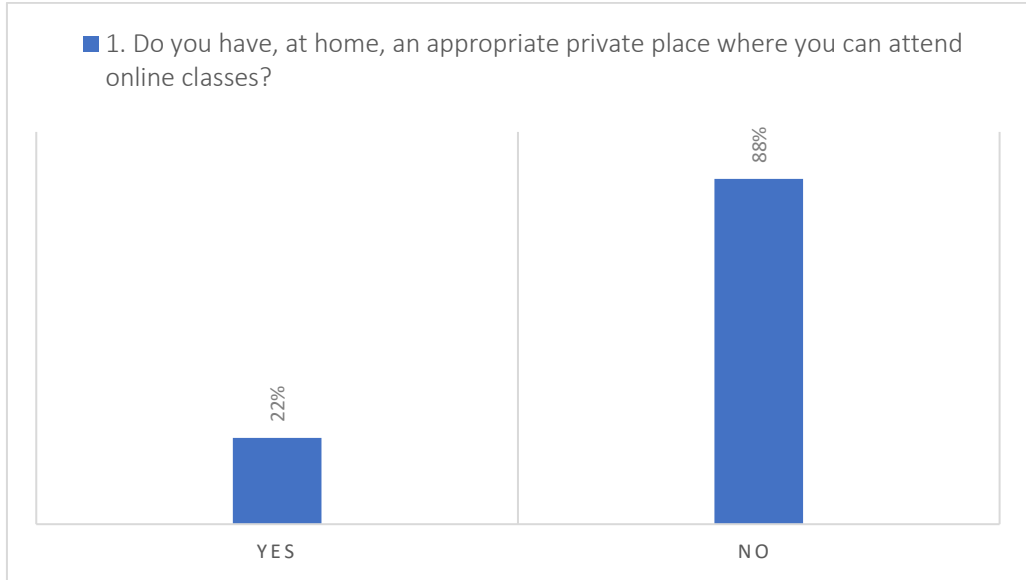
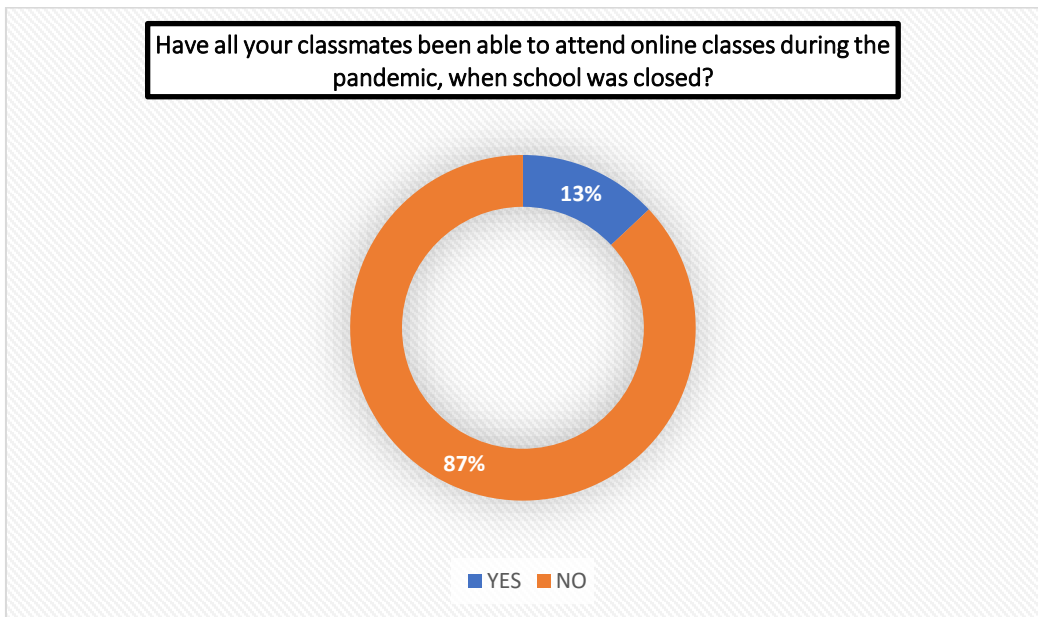


Figure 2. Degree of participation to online classes for other all classmates  
Question no. 2: *Have all your classmates been able to attend online classes during the pandemic, when school was closed?*

- YES - 13%
- NO- 87%



Question no. 3: *How did you feel when you were not able to attend online classes? (free answer question)*

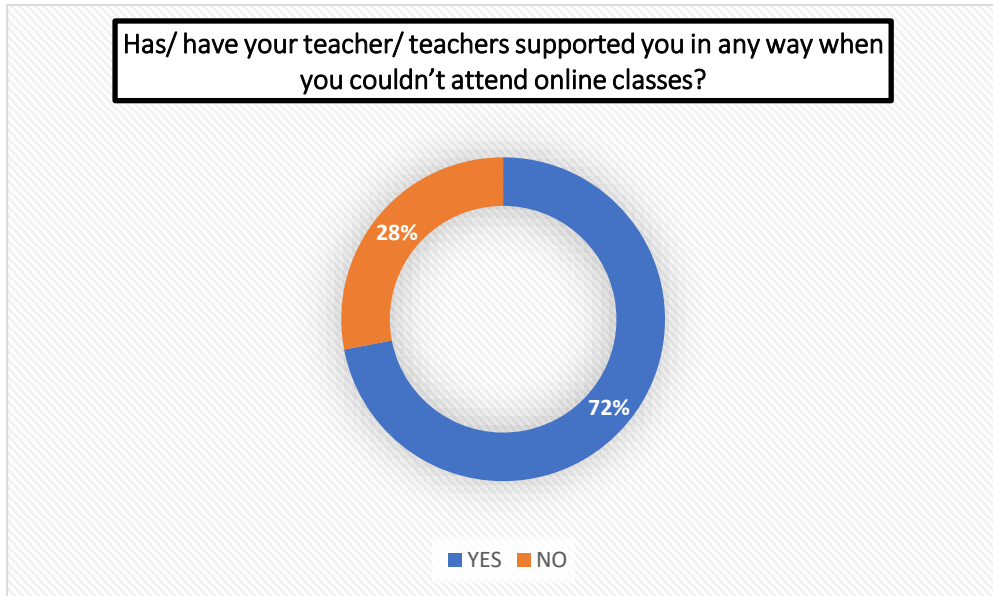
Figure 3. Feelings caused by the impossibility to attend online classes

<b>How did you feel when you were not able to attend online classes? (free answer question)</b>	
1.	I cried and I felt like I never wanted to go to school again. I was ashamed of my classmates and teachers.
2.	I begged my parents to buy me and my sister a phone or a tablet, but they don't have the means to do so.
3.	I was afraid that school would never start again and that I would never be able to learn again, like I wanted to.
4.	We are 2 brothers and we had to work to help our parents. It was very hard and it still is. Mom and dad could not buy a tablet and we received one from school last year, but we are attending classes together, because we learn in a simultaneous class. I go to 1st grade and my brother to 3 <sup>rd</sup> grade. Now it's a little better.
5.	It was very bad, because I like going to school and I missed my teacher and my classmates. Our teacher tried to make every day online classes, but the connection was very poor and many of the classmates could not attend.
6.	For me and my sister it was very bad. Mom goes in the city to clean for a family and she couldn't go anymore with Covid and everything. We have barely had money for food and last winter was very hard. We received tablets from school in October last year, but we didn't make all classes and I feel like we missed a lot and I am afraid of what will come. I miss school.
7.	Until the summer of last year I didn't attend online classes at all. In September, my dad was ill with Covid and he was very bad and I was afraid that he would die. It was very, very bad. Now he is good. I have a tablet from school, but it often blocks and my mom has to go to school over and over again to make it work. And she doesn't know a thing about devices. I am 3 <sup>rd</sup> grade now but I don't remember anything from 2 <sup>nd</sup> grade...
8.	I have had a phone since the beginning, but sometimes the connection was very bad and our teacher had to cancel classes. She tried to connect with us also during the summer vacation, but not all children were able to attend. Then it was a little better in autumn, when we went to school again and many children received tablets from school.

Question no. 4: *Has/ have your teacher/ teachers supported you in any way when you couldn't attend online classes?*

- YES – 72%
- NO – 28%

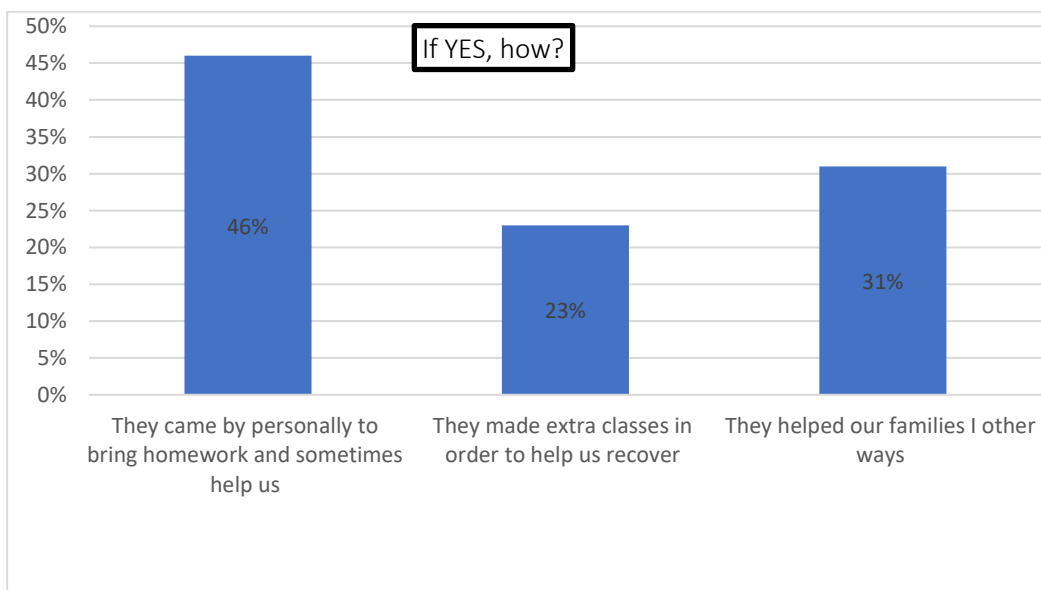
Figure 4. The existence of support from teachers



Question no. 5: *If YES, how?*

- They came by personally to bring homework and sometimes help us – 46%
- They made extra classes in order to help us recover – 23%
- They helped our families I other ways –31%

Figure 5. Types of support received from teachers

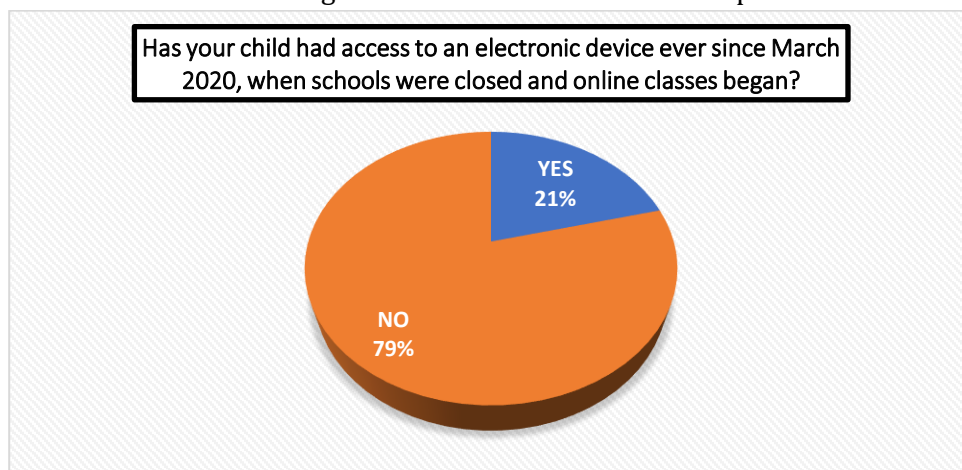


Survey applied to the parents of children enrolled in the secondary education system, from marginalized rural communities in Dolj County

Question no. 1: *Has your child had access to an electronic device ever since March 2020, when schools were closed and online classes began?*

- YES – 21%; NO – 79%.

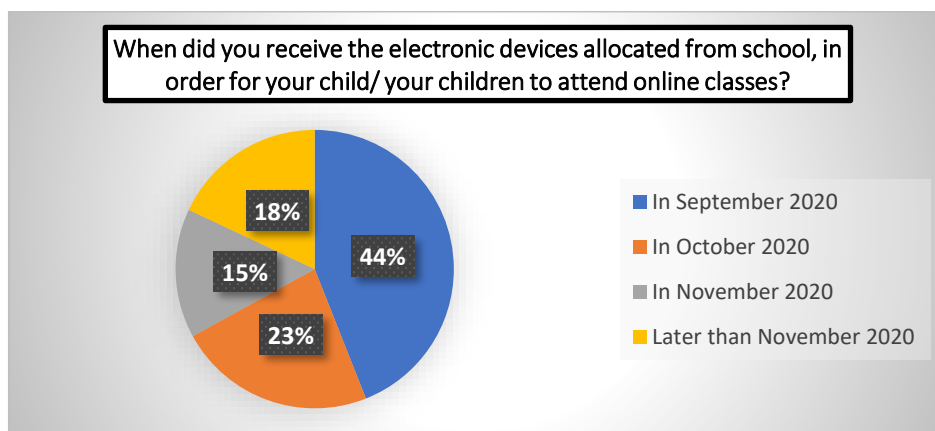
Figure 6. Access to online classes – parents' answer



Question no. 2: *When did you receive the electronic devices allocated from school, in order for your child/ your children to attend online classes?*

- In September 2020 – 44%; in October 2020 – 23%; In November 2020 – 15%; later than November 2020 – 18%.

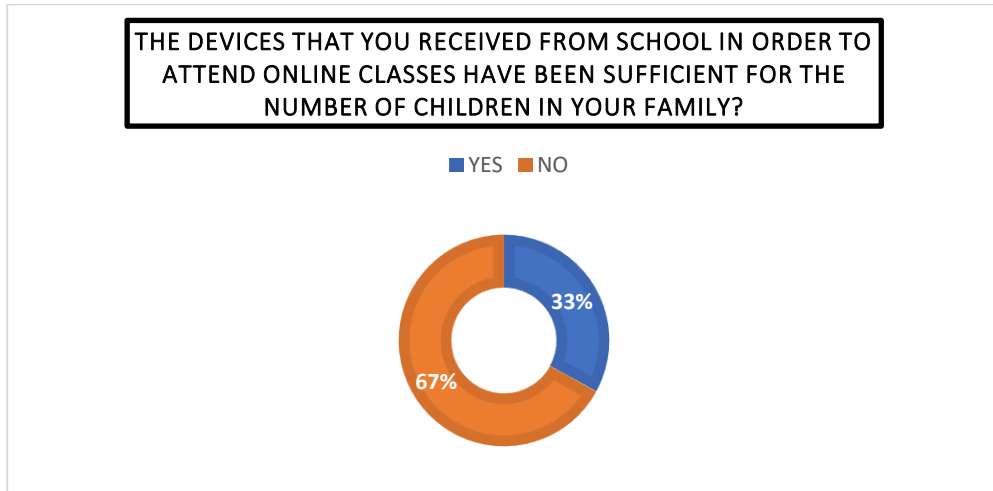
Figure 7. On-time supply of electronic devices from school



Question no. 3 : *The devices that you received from school in order to attend online classes have been sufficient for the number of children in your family?*

- YES – 33%; NO – 67%.

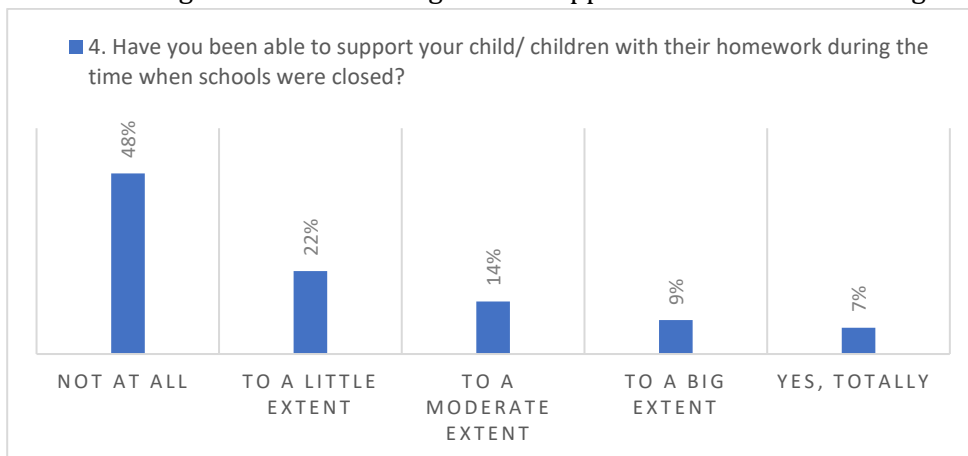
Figure 8. Coverage with electronic devices necessary for online classes ,  
at family level



Question no. 4: *Have you been able to support your child/ children with their homework during the time when schools were closed?*

- Not at all – 48%; to a little extent- 22%; to a moderate extent – 14%; to a big extent- 9%; yes, totally - 7%.

Figure 9. Parents being able to support their children in doing homework



## 6. Conclusions

The results of our study confirm the conclusions extracted from the wide range of national and international analyses performed during the global Covid-crisis, focusing on the adverse effects of school interruptions and the adoption of the online-school system.

Children suffered from various causes, from not benefitting from the necessary space endowment of their homes in order to insure privacy and proper concentration during online classes (88%), a low attendance capacity (87%), to multiple psychological effects caused by the impossibility to attend online classes and the family's decreasing or partially lost income, such as frustration, sadness, isolation, fear, anxiety. A positive outcome is acknowledged in the teachers' availability to provide support for the disadvantaged children (72%), under the form of personal help (46%), extra remediation classes (23%), support for their families (31%).

Regarding the way in which the parents from disadvantaged communities perceived the impact of the Covid-crisis and school closure, the results show that: their children did not have access to an electronic device right at the beginning of the online-school period (79%); only 44% of children had received a device from school at the beginning of the school year 2020-2021, while the rest only received it October (23%) or even later than November (33%). As it had anticipated from previous researches, the Ministry of Education was not able to provide the necessary support on time and to the real extent of the children's needs. Moreover, the number of devices allocated was rarely enough for all children in the family (33%). Most parents were able to help their children in doing homework to a little extent or not at all (70%), either due to poor literacy skills or to lack of time.

The aspect concerning the level of education in the rural environment in Romania, especially in the disadvantaged communities, has been very precarious and has been maintaining the attention of specialists and of child protection entities for many years. Increased school abandon rates, low literacy levels, poor attendance, poor results in the national assessment tests and poor graduation rates, lack of resources are amongst the most frequent symptoms of a very dangerous and concerning situation, when it comes to the future and welfare of many generations of children and also a signal for the our country's difficulty in sustaining its sustainable development objectives.

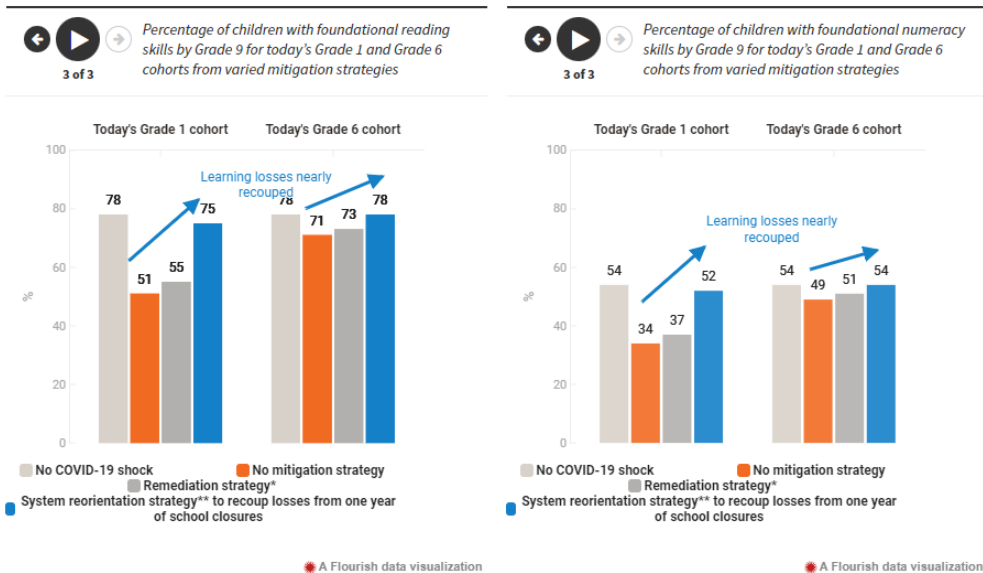
The Covid-19 crisis made vulnerable children even more vulnerable and the expected long-term effects of this educational gap are only predictable to a certain extent. For many disadvantaged children, school has always been a *safe place*, the place where they did not only receive education, but also the much needed help from their peers or teachers (socialization, counselling, free meals, help programmes etc.) in order to overcome their problems and to maintain their well being. Specialists and international bodies in the field of children's development are urging that appropriate and well-dimensioned measures are to be taken by each state, in order to attempt remediation and recovery from this multifaceted disaster.



## 7. Proposals and recommendations

According to the UNESCO report (UNESCO, 2022), children for which the educational system will implement mitigation and reorientation strategies to recover from one year of school closures have considerable chances to recoup their losses, to a level similar to the level of a “no Covid-19 shock” situation, compared to a more dramatic drop, if no mitigation strategy were to be implemented.

Figure 10. Recouping losses with or without mitigation strategies



\*Source: UNESCO (2022). *The impact of the COVID-19 pandemic on education. International evidence from the Responses to Educational Disruption Survey*

Departing from this prognosis and making use of the analyzed results, our proposals are underlining the necessity of strong and effective action from the relevant stakeholders, with the aim of recovering disparities between children, with regard to the amount of information, abilities and skills lost due to the measures enforced by the Romanian government in order to stop the pandemic (otherwise in line with the actions undergone at international level).

The Romanian Government should respect its engagement in raising financing for education – the only measure that allows sustainable recuperation measures and plans. The Ministry of Education should furthermore create and enforce integrated remediation programmes, by extending its pool of resources and specialists, by increasing teachers’ qualification, by conjugating its efforts with the more intensive struggles of non-governmental entities that have been providing essential support for disadvantaged children and their families during the whole Covid-19 crisis. Further research is also needed, in order to understand the factors that brought successful outcomes for many schools, in comparison with negative outcomes for others and to support integrating this experience in future educational resilience programming and planning.

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# ANALYSIS PERSPECTIVE OF THE HUMAN DEVELOPMENT LIMITS THROUGH THE LIGHT OF THE HUMAN SECURITY CHALLENGES

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## **Abstract**

*This article is intended as a general analysis of the relationship between human development and human security, understood as complementary visions in ensuring sustainable development. Along with this analysis, another study of statistical trends based on official data on the positive and negative aspects related to human security risks and the main directions that can ensure the development of public policies subsumed by the need for human development was also carried out.*

*The analysis of the measures adopted in different societies to ensure the economic and social development allows the identification of the logic of the governments in the light of the obtained results. The analysis of statistical data related to Romania highlights the current situation and allows the performance of scenarios related to future developments. Also, the official statistical data favor the analysis related to positive and negative factors that imply the real implementation of sustainable intervention policies.*

*In the case of this study we find that Romania tends to become a country of disparities, where the correlation between the economic, health and education systems has been lost and where the positive results in the economy tend to be limited in the future by the loss of competitiveness in the medical and educational system through poor funding, totally inappropriate for international best practice models, especially in developed countries.*

*The economic performance resulting from the total GDP and per capita is not found in the increase of the population's income, and the difficulty of covering the costs of daily living is reflected in the decrease in the quality of life of a part of the population.*

**Key-words:** *human security; human development; sustainable development; public policies*

## **1. The concept of human security**

The emergence and development of the concept of human security is closely linked to the United Nations, an international organization established "to save succeeding generations from the scourge of war, which twice in our lifetime has brought untold sorrow to mankind" (UNPD, 2002). Human security is a condition of human development, and the absence of threats of any kind serves the purpose of good governance.

In 1994, under the auspices of the United Nations, a report was prepared on the concept of human security, proposing a translation of the understanding of the concept of human security from the protection of state borders and conflicts between countries to the individual needs of people. The correlation between human security and human development was valued more,

being appreciated that the latter is a superior solution to arming the states and the population. Moreover, the analysis highlighted that human security vulnerabilities are not national or local. These result from the dynamics of global economic, social, cultural and military phenomena. Thus, we will identify various types of vulnerabilities in both rich and poor societies (UNDP, 1994, p. 3), there being various levels of them depending on the societies and the priorities of the rulers. Depending on the level of development of each country, solutions with positive effects can be identified. However, certain problems involve mitigation over a very long period of time, and spending can exceed certain limits without the guarantee of mitigation and secondary problems.

For this reason, it is recommended that public policies be geared towards prevention, in which case the costs will be lower than in the case of corrective action. Sustainable public policies aim at human development in relation to short-term humanitarian assistance, which involves constantly monitoring the opportunities and risks that affect human security, such as hunger, poverty, disease, crime or any other event that could change the usual way of life. In parallel with anticipating threats, public policies may include measures to enable the citizens of a country to develop their resilience to situations that endanger their quality of life..

The need for a structured approach implies the adoption of operational human security indicators. The purpose of such a foundation is to avoid social crises and even the disintegration of some societies. According to UNDP references (1994, p. 4) any paradigm of human development must be "pro-people, pro-jobs and pro-nature".

The coverage area of global phenomena and the differences between societies highlight the need for cooperation to support human development. Given the globalization of risks, measures to eliminate them also imply a globalization of state efforts. Commonly agreed main objectives, for example, are to reduce poverty and increase employment rates. Secondly, the "global safety net" (UNDP, p. 4) on human development needs, such as basic education and primary health care, is proposed. We emphasize that the two areas represent a minimum threshold of human development. This threshold of the minimum necessary support for human development must be complemented by productive activities, such as trade, investment, technology and workflows. A society in which these elements are present implies a small number of people dependent on aid.

Human security is a multidimensional concept that involves the separation between narrow and extended meanings (Cavaropol, 2016, p. 137). The origin of the meanings of the concept of human security lies in the absence of violence and fear of violence, concentrated in the principle of "freedom for fear" (Krause, 2007, p. 2). The complexity of the modern world and the multiple challenges have led to the multiplication of the military meanings of the concept in seven dimensions: economic, food, health, environmental, personal, community and political security (UNDP, 1994, pp. 22-24). This extension of meanings reveals the dynamism of the concept, whose meanings have evolved from the military paradigm to the needs and interests of the population. For example, human rights become basic principles in societies concerned with human security, which is disregarded in militaristic and autocratic societies, where the focus is on political security, which justifies repression against one's own citizens.

By ensuring the necessary conditions for human security, it relied on the collection of what is called a "peace dividend", which means the transfer of military spending to more productive purposes (Krause, 2007, p. 3).

At present, human security is understood from two perspectives (Krause, 2007, p. 4): the first refers to "freedom for want" according to which human security refers to the provision of food, economic, health and environmental protection needs. The second perspective refers to "freedom for fear" and includes the whole set of measures by which human security is ensured by eliminating threats related to violence or the use of force. Some examples of this approach include a ban on anti-personnel mines, measures to control small arms, etc.

From the two approaches we understand that human security is a multidimensional concept that underpins public policies aimed both at protecting the life and integrity of the

person, and at ensuring frameworks that ensure human development at a high level of quality of life.

## 2. Planning for human security conditions

António Gutterez, Secretary-General of the United Nations, emphasized the paradox of the modern world: improving quality of life indicators, such as longer life expectancy, better health and a higher level of well-being, did not reduce the feeling of insecurity (UNDP, 2022, pp. Iii). The COVID-19 pandemic has exacerbated this sentiment. We add that insecurity is manifested in relation to the sustainability of well-being and people's fears about health or quality of life. This observation suggests that there may be a directly proportional relationship between increased quality of life and increased feelings of insecurity.

Statistical data showed that during the COVID-19 pandemic, life expectancy at birth decreased (UNDP, 2022, p. 3), which fuels the feeling of insecurity of the population, which feels threatened by an imminent and invisible danger. Thus, all the accumulations of the last seventy years are blurred by the fears of an unstable and unpredictable present. It is legitimate to ask whether there is a time when the level of well-being will be so high and so rapid that it will permanently separate us from the feeling of insecurity.

The discrepancy between economic measures to increase welfare and inequality of opportunities for human development can be the main cause of the feeling of insecurity, even for people with a high level of well-being. The Human Development Report found that high HDI (Human Development Index) values have had a negative impact on planetary changes, such as climate change, disease outbreaks or biodiversity damage. Thus, the negative post-crisis effects (UNDP, 2021, p. 5) were generated by inequity factors:

- Hunger has increased globally, from 800 million people by 2020 to 2.4 billion;
- Global warming will affect the population, especially in developing countries;
- The number of people forcibly displaced has increased;
- Digital technologies have generated additional costs related to cybercrime, reaching \$ 6 trillion by the end of 2021. Also, the unequal distribution of knowledge and the ranking of companies according to technological advancement are at the root of inequalities and different rates of development.
- Approximately 1.2 billion people live in conflict zones;
- Out of 193 countries analyzed, 87% do not recognize the rights of sexual minorities;
- There is an increase in violence against women. In 2020, 47,000 women were killed by their partners or their own families.
- There is a huge gap between countries with a higher HDI and those with a lower HDI in terms of universal access to health care.

It is obvious that existing inequalities have multiple effects: contemporary societies are strongly hierarchized, frozen social structures are created within less developed societies. The gap recorded will be maintained or even worsened both between companies and between the various social strata within them.

In the case of digital crime, we point out two directions: the first reveals the competitiveness of some companies in relation to others, especially where digital skills of the population are encouraged and where digitalization is widely implemented in all or most areas of activity; digital technologies will be more dynamic where markets exist and will provide competitive advantages to these countries, suggesting that digital crime is following the various stages of development of this industry. On the other hand, digital crime will harm different companies, whether they are government documents, economic entities or even ordinary citizens, and in the economic and military competition the IT field is top notch. Statistics on the degree of literacy of the population highlight the dynamics of polarization of societies according to the information technology available to them. Even if there are global economic exchanges,

mediated by the computer system, it can be seen that there is a direct correlation between technology and economic efficiency, which in the future will create dependencies that maintain global disparities. Given the benefits that some economic entities or governments gain through digital crime, we believe that there are also gray areas where illegal or at least unethical activities are accepted and encouraged. Public scandals in recent years have illustrated the magnitude of this phenomenon, which generates human insecurity.

Violent conflicts degenerate into humanitarian disasters and amplify intolerance between states and citizens. Economic costs are found in long periods of economic and social decline. There are major risks associated with the formation of dependencies due to the different military force of the states, a strong factor in ranking and maintaining inequalities.

Health systems can be understood as indicators of the performance of the rulers of each country. The COVID-19 pandemic highlighted these gaps as a result of which it can be seen that a global threat was not countered by locally implemented policies, but by correlated measures at the global level. Moreover, the inefficiency of some medical systems has affected the efficiency of the best performing ones, so that the existing gaps have been canceled by the virulence of the virus.

Analyses based on the calculation of HDI show different dynamics of policies designed to ensure human security. These are due to the equitable distribution of surplus value achieved during periods of economic growth, the orientation towards sustainable development policies and the coherent approach of each social component that can support the formation and emergence of a trend of economic and social growth.

Global disparities are a consequence of the quality of the concerns of governments to ensure optimal conditions for increasing the quality of life. But we believe that human development policies are more complex than quality of life policies. First of all, human development involves increasing the individual's capacity to take advantage of existing opportunities to a higher level or increasing the capacity to adapt to changing social and economic conditions. Instead, policies to increase the quality of life are due to the quality of measures implemented by governments, aimed at ensuring equal access to health, education or employment. This creates a system of opportunities that are equally addressed to people with different individual access capabilities. Such a situation may explain the persistence of the feeling of insecurity even in the conditions of increasing the quality of life. The concomitant increase of the human development degree allows the individual comparison and the notification of the risks that can affect the realized accumulations.

In some countries the quality of life is increased depending on trade relations, natural resources, support of developed countries. Also, economic productivity can be achieved through certain industries, without ensuring an optimal level of efficiency from other sectors of activity. In some cases, it creates a sense of well-being and increases the quality of life through external loans and government bonuses, which will support the population in the short term. Thus, the quality of life is disconnected from individual development needs and from the principles that are supported at the global level, being oriented towards humanitarian policies with short-term effects due to the correction of social and economic crises due to internal causes. Local measures will not ensure convergence with the global economic and social dynamics favoring an increased frequency of crises generated by an unstable local dynamics due to low and insufficient funding.

In such a situation, there is a tendency to demonize the difference between globally supported and funded global development policies and internal ones aimed at managing problems due to lack of vision and objectives. In such a case and in accordance with the theme of this article, we consider that a structured approach to human development as the goal of a real public policy implies an integrated approach to the subsumed dimensions. UN Secretary-General Kofi Annan (1999, pp. 13-16) stated that peace is not just about the "absence of war", but concerns about economic development, social justice, democratization and human rights. UN High Commissioner S. Ogata said in a statement that the first approach to human security is

to enable people to live safely in their own countries, and the second is to prevent conflicts so that people can enjoy political, social and economic rights".

The relationship between the concepts of human development, human rights and human security can be seen in both relations of predominance and complementarity. Thus, Amartya Sen (2003, pp. 8-9) considers that human development includes measures to increase the quality of life, being a specific approach to periods of peace, while human security is a set of measures applicable in times of crisis and where the goal is not to accumulate well-being, but to ensure a minimum standard of living for those affected. This view is linked to the idea of human rights, guaranteed in democratic states and understood, from the perspective of human security, as a minimum standard to ensure the survival of those affected.

The principles of human security are also found in the legal perspective of individual rights, whether we are talking about the rights of negativity, which states the individual's right not to be physically harmed or tortured, or whether we are talking about positive rights such as the right to social assistance or services leading to increased individual well-being (Wenar, 2010).

Effective human development planning requires a multidimensional approach, taking into account the following aspects: the cyclicity of economic phenomena, which are characterized by periods of growth and decline in a permanent succession, irrational periods, in which aggression and violence are preferred to dialogue and compromise, geopolitical dynamics and competition between states and internationally promoted ideologies. These issues involve the alternation of human development measures with those related to human security, as an alternative policy in crisis situations and understood in the broad sense accepted today internationally, which must integrate the seven dimensions that completed the military approach.

### **3. The evolution of the Human Development Index in Romania**

Beyond the theoretical approach, which still raises new points of view and various approaches, we must take into account the situations that support the various points of view depending on the concrete and measurable data. We will find that the Human Development Index is a synthetic indicator of the performance of states and that explains to a large extent the risk situations and the harmful consequences of the realization of risks.

The situation in 2019, prior to the COVID-19 pandemic and the completion of the 2020 report, shows a significant difference between the countries included in the target group (UNDP Report Office 2020): in first place was Norway with an HDI value of 0.957, and on the last place is Niger with an HDI value of 0.394. This difference results from a life expectancy at birth of 82.4 years, a period of schooling of 18.1 years and an average schooling of 12.9 and a GNI per capita of \$ 66,494. Niger has a life expectancy at birth of 62.4 years, expected years of schooling of 6.5 years, mean years of schooling of 2.1 years and a GNI per capita of \$ 1201.

Romania ranks 49th out of a total of 189 countries, with an HDI of 0.828 with a life expectancy at birth of 76.1 years, with an expected years of schooling of 14.3 years, with a mean years of schooling of 11.1 and a GNI per capita of \$ 29,497. Depending on the hierarchy resulting from the analysis of each indicator, Romania is on the 70th place in terms of life expectancy at birth (on the 1st place was Hong Kong with 84.9 years, and on the last place was the Central African Republic with 53.3 years). From the point of view of the expected years of schooling, Romania ranks 73rd (in the first place is Australia at 22 years old, and in the last place Eritrea is 5 years old. Germany is 14.2 years old and Burkina Faso is 1.6 years old, and in terms of GNI per capita, Romania ranks 48th (Lichtenstein is \$ 131,032) GNI per capita, and in last place is Burundi with \$ 754 GNI per capita).

We note that the current place in this hierarchy was primarily due to the economic performance that placed Romania in 48th place out of 189 states, but the priorities of future policies to improve the value of these indicators are related to the average level of education and improving life expectancy, where a major role is played by the health system. The



explanations for such a structure are no longer difficult to identify: both the health system and the education system in Romania have been underfunded for many years, which has led to a slowdown in HDI growth, with prospects of regression in the future if the same investment trend is kept. HDI's 2020 analysis distinguishes between five categories of states, depending on the value of the composite index. Romania is in the first category of countries with a very high HDI (UNDP 2020). By comparing the trends from 1990, the year of the fall of communism and until 2019, Romania registered an average annual increase of 0.54%. From the point of view of the percentage increase of HDI in the period 1990-2019, Romania is on the 35th place, with an increase of 16.95%, which illustrates the trend of approaching these indicators. The highest increase was recorded by Turkey with an increase of 40.65%, followed by Singapore with 30.10%, Mauritius with 28.85%, Malaysia with 25.97% and Croatia with 25.70%. We specify that all these countries had in 1990 a lower HDI than Romania, placing in 2019 at a higher level. This dynamic illustrates the differences between the public policies implemented and their continuity. Thus, the international dynamics show that the growth rate is essential in ensuring an increased competitiveness of each state.

Focusing on the group of states in the same category that Romania belongs to (Very High Human Development), we mention that public policies contain elements that ensure the premises of human development and ensure a minimum sense of human security, so that measures of any kind must ensure the convergence of the interests of different sections of the population: for example, Inequality-adjusted HDI highlights the situation in terms of the effectiveness of measures to ensure equal opportunities for the population. The hierarchy generated by the difference between HDI and Inequality-adjusted HDI signals differences in public policies that ensure the basics of human security. Thus, Romania is on the 19th place in this hierarchy, with a difference of 0.098, which suggests that inequality of any kind must be in the attention of the rulers. In addition to this observation, the Coefficient of Human Inequality, which is obtained by calculating the averages of inequalities in health, education and income, highlights the situation in different societies, generally indicating the priority objectives of the government. Romania occupies the 18th position with a coefficient of 11.4. In the first place of inequality is Panama with a coefficient of 20.1, and in the last place is the Czech Republic with a coefficient of 4.4. It is also found that the countries with the highest HDI values have very low values of inequality coefficients.

In the case of inequality of access to education, Romania ranks 27th in 2019 with a coefficient of 5.3%, where Spain is in first place with 16.9%, and Czech Republic is in last place with 1.4%. In the case of income inequality, Romania is on the 13th place with a percentage of 22.7% in a hierarchy in which Panama is on the first place with 36.9%, and on the last place is Slovenia with 8.7%. The functioning of the health system is generally analyzed by life expectancy at birth and health expenditure as a share of GDP. Romania ranks 54th out of 66 countries in terms of GDP spending on health, which affects the overall value of HDI and increases the population's sense of insecurity. For example, the United States allocates 17.1% of GDP, followed by Switzerland with 12.3%. In the last places are countries like Qatar with 2.6% and Brunei Darussalam with 2.4%. In the case of education and government expenditures on education reveals a low attention paid to this dimension: Romania is on the 50th position in a hierarchy of 54 states for which statistical data are available. These expenses in 2019 accumulated only 3% of GDP. Norway's highest spending is 8.0% and Bahrain's lowest is 2.3%.

The economic performance of each country is different and measured by a series of indicators that illustrate the functionality of several areas of economic activity. In terms of GDP of each country, the USA is in first place with \$ 20,575.0 billion total GDP and \$ 62,683 GDP per capita. Romania ranks 21st with a total of \$ 578.9 billion GDP and \$ 29,909 GDP per capita. The share of labor in GDP, which includes wages and transfers of social protection, differs from state to state and does not necessarily reflect the values of total GDP and per capita. Thus, Romania ranks 53rd with 44.8% of GDP, while countries such as Switzerland this proportion is 70.7%, the Netherlands 63.9% and Belgium 62.5%. Romania's position is framed by countries such as

Mauritius with 45.1% and Malaysia with 41.8%. Instead, the consumer price index has a different hierarchy. Romania is on the 15th position with a consumer price index of 124 in 2019 compared to 2010 (where 2010 = 100). Please note that this indicator represents the weighted average of the prices of a basket of consumer goods and services such as transport, food and medical care. The index is made by taking into account the price changes for each item in the predetermined basket of goods and their average. The fluctuation of this indicator also reveals the economic stability of each company and the quality of the development policies implemented, simultaneously with the implementation of measures to ensure human security in the sense specified by Amartya Sen (2003).

Analyzing these general data we find that from different HDIs is a composite indicator whose values can be influenced by certain components, but which allows comparison with the values of other countries both in general and at the level of each indicator integrated in the calculation. In the case of Romania, we find that there is a positive value of the general economic indicators, which do not bring increases in the other sectors of economic activity. We can talk about a decoupling of the economy from the social system, in which the logical correlations between the economy, health systems, education and income are ignored. Romania tends to become a country of contrasts, due to ignoring socio-economic processes that favor social polarization and permanently make a large part of the population vulnerable.

## **Conclusions**

Analyzing the above data, we find that the feeling of insecurity is due to inequalities found by citizens, regardless of income level. The persistence of this feeling is a factor of constant pressure on the citizens of a society. Moreover, the repeatability of crises is another factor with significant effects on the population. The apathy installed by this repeatability of the crises will be demotivating for a good part of the population that will feel that every time the crises will affect them no matter what happens and the intensity of personal efforts. In the case of companies that do not pay much attention to crisis management, their cost will be passed on to the population, which will have to bear the difficulties caused by the decline in quality of life.

Another factor that fuels the feeling of insecurity is the novelty of the types of crises, which are increasingly complex and difficult to manage given their global nature. Along with the novelty we have to deal with the alternation of types of crises, on the one hand there is a cyclicity of economic and financial crises, complemented by a cyclicity of extreme natural phenomena, such as floods, earthquakes, hurricanes, etc., completed in recent years with a global medical crisis with consequences that are impossible to calculate at present and which continues with a military crisis that amplifies at unprecedented levels the feeling of insecurity of the population. Thus, the succession of crises in the last 10-12 years has created major challenges for the rulers and has highlighted the need to intensify international cooperation to mitigate the negative effects.

Another factor that contributes to the increase in the feeling of insecurity is the coverage area. We find that the emergence of a crisis in the contemporary world is largely characterized by the global influences it manifests. The number of countries and people affected is growing. Most crises exceed regional and national boundaries, becoming the cause of phenomena that affect other societies.

The present is characterized by uncertain scenarios, where the causes involve complex inferences because it knows the possible consequences and to understand the measures that can favor the positive results and inhibit the negative ones.

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# THEORETICAL-METHODOLOGICAL ELEMENTS OF SOCIOLOGICAL RESEARCH OF SOCIETY'S RESPONSE TO CRIME

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**Abstract:** The social response to crime is associated with the fight against crime. This "fight" is carried out by means specific to the defense of such important social values protected by law, respectively by legal means of criminal law and criminal procedure. Social control becomes a real mechanism by which society verifies its members, a social mechanism by which law, norms, customs, morals, ethics and morality are considered as forms of social control that impose different types of social reaction in case of their violation, by non-compliance. The reaction against delinquency, crime in general, gives rise to certain typologies. The main types of social reaction are those related to the repressive mode of reaction, the preventive typology of social reaction and the dual model. The models, the standards of criminal policy that we find in different countries, cannot be and are not identical. They are closely linked and depend on the political, social, economic and cultural specifics of each country, its own historical progress and evolution, the regional situation in which it is located but, last but not least, the state and dynamics of the criminal, national and transnational phenomenon. Using the questionnaire method, a group of respondents from different social backgrounds, of different ages, people who were more or less confronted with the act of justice was interviewed. Approaching this method of sociological research, I outlined some of the elements that reflect the reaction of society to delinquency analyzed through the prism of the state's criminal policy.

**Keywords:** delinquency; social control; social reaction; prevention; repression.

## 1. Introduction

Over time, delinquency has taken a different approach to society's reaction to such behavior. If the sanction of the civil society of the deviance is, in general, of disciplinary, satirical, moral or pecuniary order, regarding the delinquency, the majority sanction is the repressive or preventive action.

Punishment is thus the repressive example, deprivation of liberty being the most common model.

Starting from the fact that the penitentiary is a form of isolation of delinquents from society, it was appreciated that the one who committed a crime by being imprisoned in the penitentiary also goes through a process of resocialization. If, from this point of view, the isolation of those who violated the law, the company's reaction appears as a form of repression that manifests itself immediately after committing the crime, the preventive reaction of the company seeks to anticipate unlawful behavior and consists of a whole . and activities aimed at preventing the commission of offenses or misdemeanors.

A not very in-depth analysis highlights a mixed model of social reaction to crime, a model that consists of both repressive and preventive measures. All this is reflected in the criminal policy of a state.

Criminal policy, "has nothing, or in any case, should have nothing to do with politics ... politics. However, criminal policy is limited to the broader sphere of a state's general policy, but only to the extent that it is understood and practiced in its traditional sense of managing the affairs of the city." (Cioclei, 2009: 2)

Criminal policy can be nothing but "management of the criminal phenomenon" (Cioclei, 1994: 2). It can not be detached from the broader context of "criminal sciences", namely criminal law, criminology, penology, etc.

Thus, in order to combat but also to prevent the phenomenon of crime, criminal policy was born as part of the general policies of a state.

With the evolution of mankind, in the modern period of the last decades, the issue of social reaction against crime but also the crime of progress itself. Although scientific research on the causes of crime has made remarkable progress, it would be considered to a small extent in the field of criminal policy.

It was estimated that prevention in the sense of actions on the socio-economic causes of crime involves high costs. However, crime has even greater consequences, its effects reaching not only the material side of society. As Professor Aurel Dincu put it, "Crime is a luxury that Romania cannot afford, that is why it must be prevented." (Cioclei, 1994)

"In general, conflict means an open position, a struggle between individuals, between communities, between groups and between social classes, between parties, between states that have divergent or incompatible interests at the moment, regarding the possession or management of goods.

Assuming conflict is an indicator of a democratic character for a social system. Power pluralism, program competition, alternative change projects, competitive electoral processes, negotiation, conciliation and arbitration procedures are characteristics of complex society systems, ways of maintaining social order." (Otovescu, 2003: 194)

Social control becomes a real mechanism by which society verifies its members, a mechanism that comes to identify what is deviant behavior in relation to what is good and what is bad, including what it means to break the law. Within this social mechanism, to keep under control the members of the society, the law, norms, customs, morals, ethics and morals, are considered as forms of social control that impose different forms of social reaction, in case of their violation, by non-compliance.

The social reaction against crime is associated with the fight against crime, which must be achieved through specific means of defending such important social values protected by law, respectively by legal means of criminal law and criminal procedure. "Hans Kelsen stated that the pursuit of justice seeks, in fact, eternal, human happiness ... justice being the social happiness, guaranteed by the social order. Cicero defined justice as the queen and mistress of all virtues, and Domitius Ulpian identifies the notion of justice with the constant and perpetual desire to give everyone what they deserve". (Iordache, 2015)

## **2. Types of social reaction against crime**

The term "reaction against delinquency, crime in general" can be defined, on the one hand, by legal means, as a way for the authorities to react, to take action against actions that do not conform to the values and norms of society, but as well as a necessary backlash from society, on the other hand.

David Ogien in "Sociology of Deviance", referring to the concepts of deviance and social conformity, showed that sociologists generally consider deviance as a deviation whose nature can only be determined by virtue of a certain definition, conformity and whether proponents of normative and integrative models disagree on the significance of these deviations, which is due to the fact that they defend different conceptions of the criteria used to assess this compliance.

The models, the typology of criminal policy that we find in different countries, cannot be and are not identical. It is closely linked and depends on the political, social, economic and cultural specifics of each country, its own historical progress and evolution, the regional situation in which it is but, last but not least, the state and dynamics of the criminal, national and transnational phenomenon. .

The main types of social reaction are those related to: the repressive mode of social reaction, the preventive typology of social reaction and the dual model.

### **3. The repressive typology of social reaction**

From a historical point of view, for a long time, the society had a totally repressive reaction at the time of committing the crime, so it can be said that in the perseverance to oppose crimes in society, the repressive model of social reaction against crime was the first which was adopted by human society.

The repressive typology of social reaction is a post-criminal attitude. Criminal sanction, punishment, is the basic means of reaction of the repressive model. By applying repressive measures, by applying punishments, the company responds to acts of a criminal nature.

The repressive model was based on the premise that anyone who has done evil must suffer harm in turn. Having as main attributes the social repression, the severity materialized through punishments, the individual and collective intimidation represent the objective of the repressive model.

### **4. Preventive typology of social reaction**

Historically addressing criminal law and criminology, the first ideas for reform began in the middle of the century. the 17th century being the ideas of Cesare Beccaria. The classical school of criminology marks the beginnings of criminology, in the sec. XVIII, through the works of the Italian Cesare Bonesana Beccaria.

Thus, in 1764, Beccaria published in Milan the work "On Crimes and Punishments", which contains no more than 100 pages, but whose revolutionary ideas, many of them current, have triggered remarkable transformations in the criminal systems of European states. , as well as the principles underlying Article 7 and Article 8 of the "Declaration of the Rights of Man and of the Citizen" of 1789.

The preventive model is a pre-crime social reaction that aims to prevent crime. The object of the preventive model is the causes of crime, so the factors that generate this phenomenon.

### **5. The mixed, dual model of social reaction**

This model was formed as a result of the intertwining of the repressive model with the preventive model. Analyzing from a historical point of view the origin of this typology which has a repressive - preventive character, it is found that this dual, mixed model of social reaction emerged as a result of the confrontation of ideas between the classical school and the positivist school.

The mixed model combines criminal and misdemeanor repression with general and special prevention of sanctions. One of the representatives of the mixed model was Mark Ancel. In his work "The New Social Defense" published in 1954, he emphasized the individualization of punishment both at the time of its application and at the time of execution.

However, delinquency also has positive aspects. It is a factor of health and social progress and the reasons that lead us to recognize it are many.

First of all, habits, human behavior is influenced by impulses of a social, biological or psychological nature and actions lead people to commit acts of a criminal nature. However, social control does not agree with these views, arguing that if man were not constrained by law, he would naturally commit crimes. The positive aspects of delinquency lie, first of all, in the fact that, in contrast to it, social conformity is promoted in society.

Secondly, by identifying and rejecting nonconformists, assimilated by society with "bad" individuals, the cohesion of the conformist majority considered to be "good" people is strengthened.

Thirdly, the existence of a large number of deviating acts leads to the conclusion that the infringed rules are not appropriate, requiring changes to them or the adoption of new ones.

Thus, the recognition of deviance highlights the need to create rules that require social compliance, an important role for the criminal policy of the state. In fact, the current criminal policy of the Romanian state is a mixed, dual model of reaction against crime.

For example, the legislator, noting that special prevention and general prevention of antisocial behavior, which are the ultimate goals of the contravention legislation is no longer achieved, and the fight against the contravention phenomenon is severely affected by the imperfection of our positive law and the attitude of those who argue with the law. weakness, the senators initiated a bill to amend art. 287 of the Criminal Code regarding non-compliance with court decisions.

Thus, the sanctions of contravention would not have a repressive purpose, if those whose work has been transformed into work for the benefit of the community, the obligation to pay a fine, could not be subject to the execution of these sanctions.

The bill, currently registered in the Chamber of Deputies for debate, starts from the desideratum that whoever will not perform community service ordered by the court for non-payment of the fine, would be criminally liable.

Thus, the lack of a penalty sanctioning the non-execution within a fixed term of the court decisions having as object the obligation to perform a work for the benefit of the community in case of non-payment of a fine, derides the preventive educational effect of the contravention sanction.

Therefore, the parliamentarians proposed the amendment of art. 287 of the Criminal Code regarding non-compliance with court decisions, following that in para. (1) to introduce a new letter "h)", which will provide that the non-execution of the court decision by which the offender was obliged to perform an activity for the benefit of the community under Article 39 ind.1 of Government Ordinance No. 2/2001 on the legal regime of contraventions within a period of 60 days from the finality of the sanction shall be punished by imprisonment from 3 months to 2 years or by a fine. "

Thus, it is shown in the substantiation note, this legislative proposal has both a preventive purpose, to protect an essential social norm, but also an educational purpose.

A sample of 166 people of different ages, vocational training, level of education were interviewed using the questionnaire method to see how respondents perceive the state's criminal policy, what is society's reaction to delinquency, if it considers that it should new legislation has been adopted to make the punishment of perpetrators more severe. Last but not least, the aim was to observe the perception of the punishments applied, as he considers the need to apply a prison sentence for the social reintegration of the offender who committed crimes with a low social danger.

Respondents answered questions and expressed their views on whether the presumption of innocence of persons under investigation for criminal offenses is fully respected in Romania, if they consider that the control of the criminal phenomenon is the immediate result of a criminal policy that focuses more on the repressive purpose of the sentence, heavy sentences, exemplary sentences, or the preventive purpose of the sentence, respectively legal education, etc. and, last but not least, the respondents were invited to answer the question which is, in their opinion, the cause of criminal phenomenon.

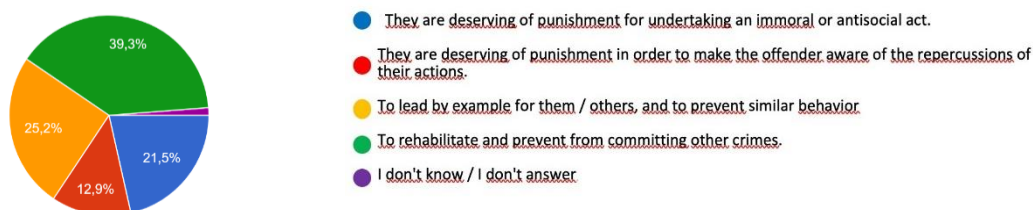
Thus, out of the 166 respondents, the majority, respectively 99 persons representing a percentage of 60.7% of the total respondents were female persons, and the majority of respondents, 44.4%, were aged between 35-55 years and 73.6% come from urban areas, and 43.3% have university degrees.

Most of the respondents, respectively 60.4% work in public institutions, 25.6% work in a private company, 9.8% are pupils or students, 1.8% are unemployed and 2.4 % are retired.

19.5% of the interviewees were involved in a criminal trial, 14.6% were even accused in the criminal trial, 22.9% had the quality of injured person, 25% had the quality of witness, and the highest on the other hand, 37.5% had another quality in the criminal process.

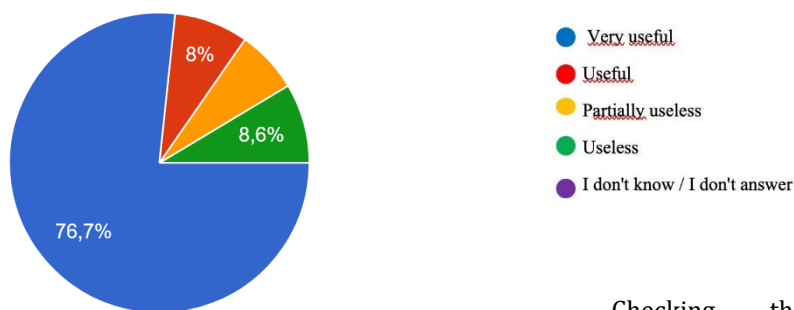
Referring to the reasons why criminals are punished, a very small percentage of the respondents, respectively 1.2% did not express their point of view, the rest expressing an opinion that I think is qualified. Thus, most of the respondents, 39.3% considered that the reason why criminals are punished by society would be to correct themselves and not to commit other crimes, 25.2% thought that the reason why criminals are punished is that of exemplary, preventive, to set an example to others and to discourage the commission of similar acts. 21.5% considered that the perpetrators deserve to be punished for committing an antisocial act and only 12.9% emphasized the preventive nature of the sanction, answering that the punishment is applied to the offender in order to allow him to be aware of the consequences of the act.

**Figure 1**



With regard to the state's criminal policy, the respondents were asked if they considered that new legislative measures were needed to eradicate the criminal phenomenon. The majority of respondents, 76.7% considered that the punishment of criminal acts should be harsher, 8% considered that it should be maintained. Only 6.7% thought that the punishments should be less than they are (8.6% did not answer or did not know how to answer).

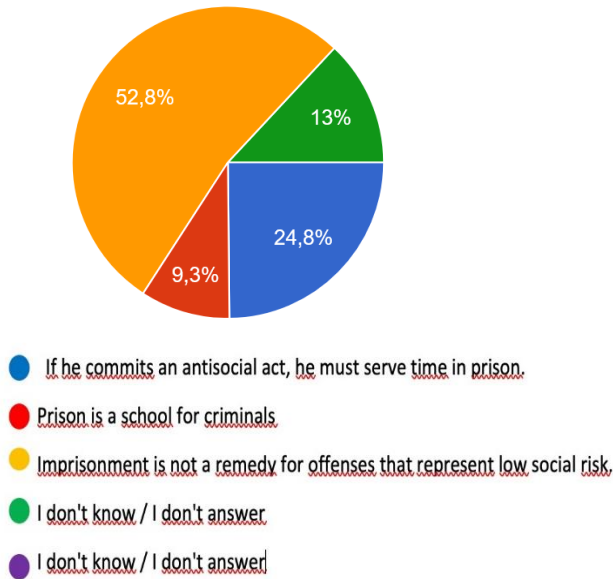
**Figure 2**



Checking the citizen's perception of the need to apply a criminal penalty for committing a crime, 52.8% of respondents said that imprisonment is not a solution for crimes that have a low social danger, 24.8% considering that if an antisocial act was committed, "imprisonment" should be done, 9.3% considered the prison to be a school for criminals, and 13% did not respond.

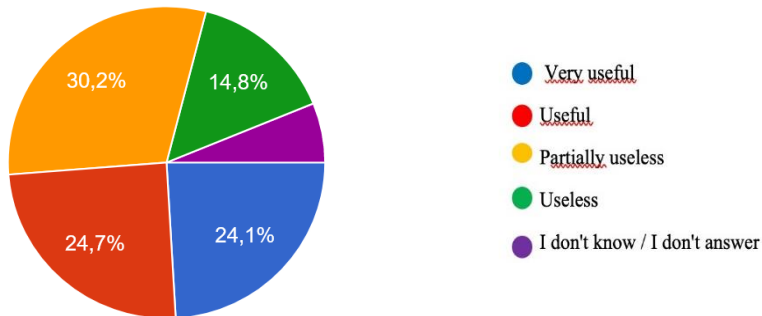
**Figure 3**





The need to serve a prison sentence for the social reintegration of the offender who committed crimes with a low social danger, was considered partially unnecessary by 30.2% of respondents, 24.7% of respondents considered it useful, 24, 1% that it is very useful, 14.8% completely useless, and the remaining 6.25% did not give any answer.

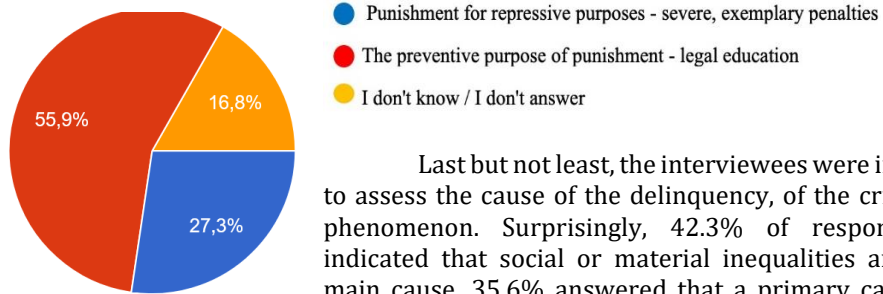
**Figure 4**



Regarding the presumption of innocence, 51.2% of the respondents considered that they are not fully respected in the criminal proceedings, 34.1% of the respondents considered that they are respected, and 14.6% did not answer or did not know how to answer .

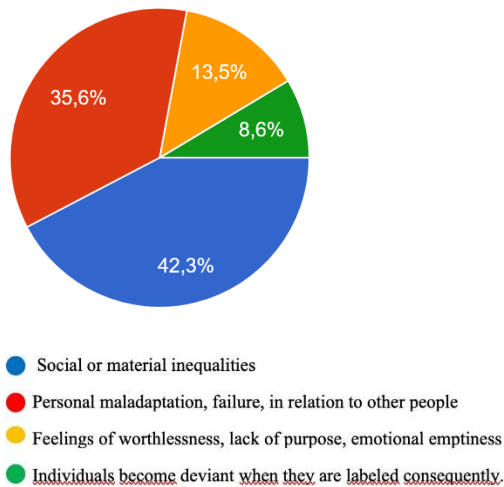
55.9% of respondents said that keeping the criminal phenomenon under control was an immediate consequence of a criminal policy that places more emphasis on the preventive purpose of punishment, on legal education, etc., ie on prevention, and only 27.3 % answered in the sense that large, exemplary punishments, their repressive character is the element that influences the evolution of the criminal phenomenon.

**Figure 5**



people, 13.5% considered that a first reason would be the feeling of uselessness, aimlessness, emotional emptiness, and 8.6% considered that individuals become deviant when a deviant label is applied to them

**Figure 6**



## 6. Conclusions

People's needs, social life appropriate to the rules of law, rules, are influenced by economic and political life, the environment, wars, crime as a whole, so sometimes it's just a step towards deviant, delinquent, chaotic behavior.

Despite indisputable theoretical valences and beneficial functions, the use of the notion of social control requires scientific caution from researchers as it includes some connotations and evaluative nuances, sometimes even with ideological significance depending on who controls what controls and especially how they achieve control (Banciu, R[dulescu and Voicu, 1985: 79).

Because, the attempt to control the criminal phenomenon is the immediate consequence of a criminal policy that must place more emphasis on the preventive purpose of punishment, on legal education. Legal education in schools, according to the latest regulations, becomes a compulsory subject in all primary and secondary schools in Romania starting with the school year 2022-2023, the criminal policy thus emphasizing prevention, education, because heavy, exemplary punishments do not represent the best solution for keeping the criminal phenomenon under control.

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# EXPLOITATION OF SOLAR ENERGY IN THE YAOUNDE 3 AND 5 SUB-DIVISIONS OF CAMEROON: SOCIO-ECONOMIC AND SPATIAL IMPLICATIONS

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**Abstract.** Nowadays, solar energy occupies an important place in the socio-economic development of Cameroon. As such, according to the National Energy Plan (NEP), the solar energy received in this country is estimated at 89.25TWh/year. This study focuses on the socio-economic and spatial implications of the use of solar energy in the city of Yaoundé, focusing on Yaoundé 3 and 5 Sub-Divisions. Direct observations, photovoltaic energy installations as well as data from various sources collected between September 2016 and March 2017 indicate that solar energy is actually present in the city of Yaoundé. It facilitates commercial activities and the creation of jobs. It is a factor in promoting urban safety, cohesion and social dynamics in this area. It becomes, however, necessary to increase the exploitation and consumption of this form of energy in order to enable the State to benefit from it for its economy as a whole.

**Keywords:** solar energy, sustainable development, operating structures, photovoltaic energy, socio-economic implications

## 1. Introduction

Ever since the industrial revolution in the second half of the 18<sup>th</sup> century, demand for energy throughout the world has been increasing. As such great quantities of fossil fuels (petrol, gas and other by-products) are the energy sources consumed throughout this time. This results in a high and increasing concentration of greenhouse gases especially Carbon dioxide (CO<sup>2</sup>) in the atmosphere; reasons for the alarm bells sounded by the United Nations Organisation (UNO) through the different Earth Summits (Rio de Janeiro, 1992; COP21 in Paris, 2015) and the important place given to renewable energy sources lately. This action of the UN is very significant since all modern states need to massively produce energy to sustain their growth. So, in order to solve the energy deficit that is paralysing countries since the 1990s and guarantee a sustained supply of cheap electric energy, the government of Cameroon laid down a development plan for the electricity sector in the 2030 horizon (PDSE 2030, 2006). This plan for which the main articulations are detailed in the Growth and Employment Strategy Document (GESD 2030, 2009), defines the optimal investment programme for the energy production means for this country. This document offers renewable energy sources a relatively important place, notwithstanding the aspirations of the international community and the abundant potentials in solar energy.

At the end of 2011, several experts considered that Africa in general and Cameroon in particular still had difficulties in satisfying the energy needs of their populations. If an average of two out of three Africans do not have access to electricity this proportion will be about 60% in Cameroon (Africa, July 2011). Localities still plunged into darkness, recurrent and untimely blackouts amply testify to this. Yet, Cameroon has countless sources of energy resources that need just to be exploited and used conveniently. Among these resources, solar energy stands the best position.

Situated in the sunny intertropical zone, Cameroon has to benefit from it to satisfy its increasing energy needs and propel its socio-economic development. Photovoltaic energy, generated by the transformation of solar rays into electricity is of capital importance to the populations. Till date, in effect, socio-economic development and energy supply from any source are indissociably linked. This reality is thus perceptible in industrialisation, tourism, numeric economy, the operation of trade and services activities etc. In this order, on its path to emergence in the 2035 horizon, Cameroon considers the development of the energy sector as important for its economic development as a whole. However, since the beginning of the 2010 decade, a sort of fascination to exploit photovoltaic energy has been observed among Cameroonian government authorities. Despite the embryonic character of this interest, several forms of support from development partners in terms of training and investment in this new sector have been observed on the spot. Urban centres in general and the town of Yaoundé in particular stand out as experimental field of this energy advantage side by side with the hydroelectric energy.

Due to this, a photovoltaic energy experimentation centre was opened at the University of Yaoundé 1 campus in 2012 with the focus being the signing of an exploitation contract of this energy with an experimental concession of electric buses circulating in the campus. In addition, the road linking the central town of Yaoundé to its Eastern suburban areas where the University of Yaoundé 2 is found in the town of Soa is completely lighted by this new form of energy. This tendency is also partially observed in several areas and roads in the town of Yaoundé. In the same manner, several partners such as the Turkish and the Chinese are storming to sign contracts for the fabrication and installation of solar energy panels capable of solving the energy crisis in the rural areas of Cameroon. Even if these perspectives are still seen in terms of projects, it is evident that solar energy is increasingly being exploited in Cameroon. Understanding the contributions of this energy source to the socio-economic development and its spatial implications in Cameroon in general and within the Yaoundé 3 and 5 Sub-Divisions in the town of Yaoundé in particular are the major preoccupations of this study.

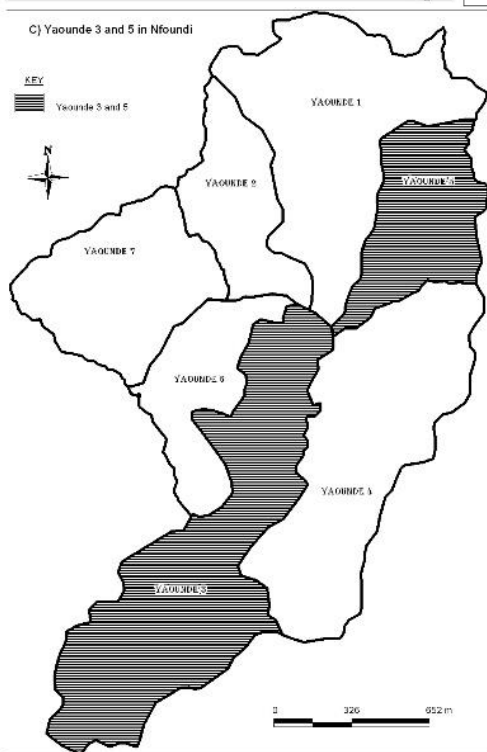
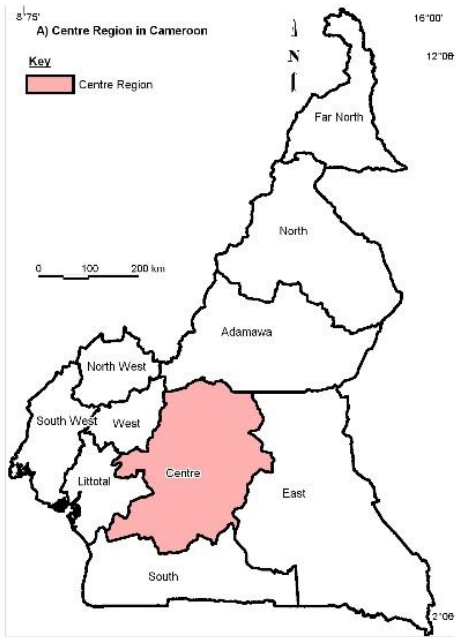
## **2. Methodology**

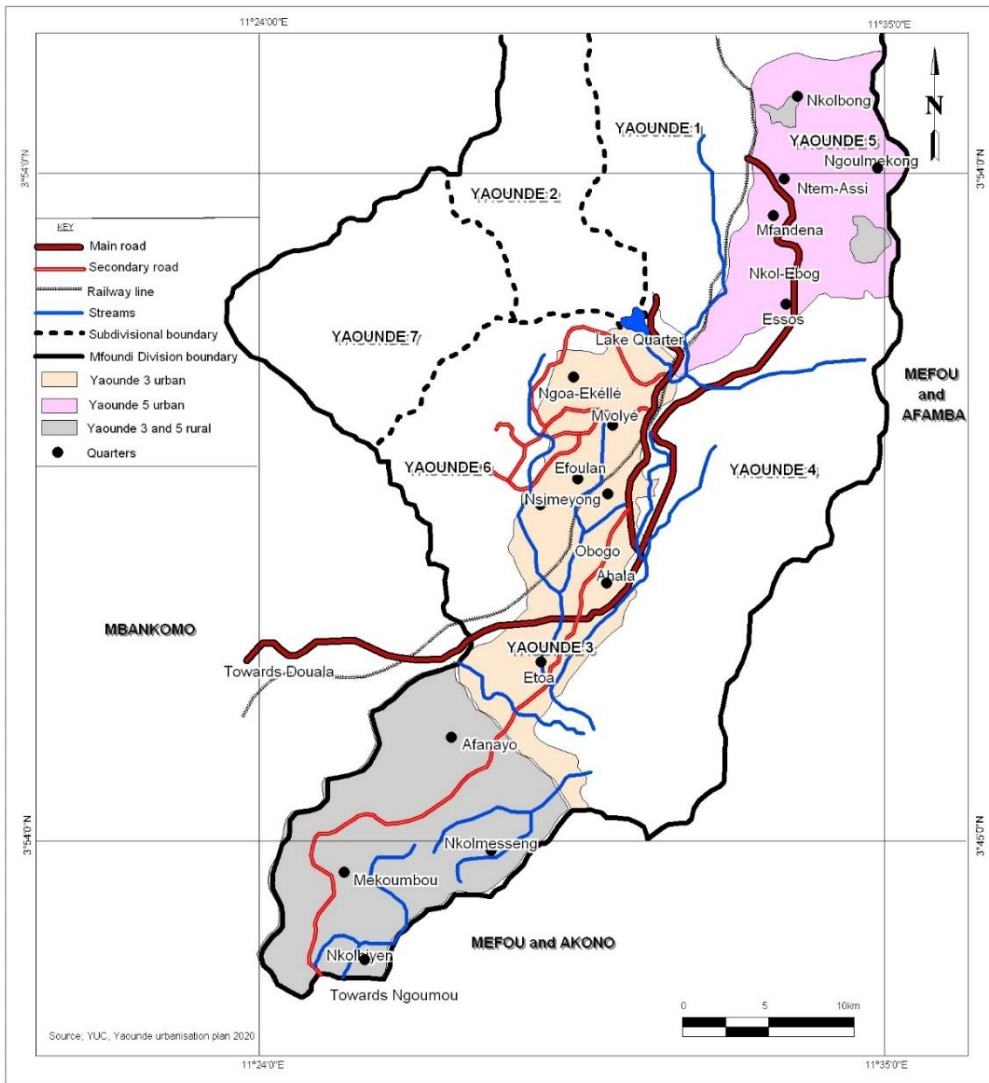
Photovoltaic energy is an integral part of renewable energy. These are sources of energy whose renewal is quite fast for it to be considered as inexhaustible at the human scale of time. It is for this reason that according to ENEO (2014), the energy exploitation company in Cameroon, renewable energies are forms of energy whose consumption does not reduce the resource at the human time scale. Here, the stock can be renewed in a few years. This is what made Olivier Gergaud (2009) to say that an energy source is renewable if consuming it does not limit its future use. This is the case with the sun, wind, rivers the earth and wet or dries biomass. According to law n°

2011/022 of 14 December 2011 organising the electricity sector in Cameroon, photovoltaic solar energy is energy produced by the transforming of sunlight into electric current using the photovoltaic effects of photosensitive semi-conductor materials.

The Yaoundé 3 and 5 subdivisions as shown on figure 1 represent the spatial framework of this study. These sub-divisions are increasingly making good use of the exploitation of photovoltaic energy in the town of Yaoundé in general.

The experimentation of lighting a street in Ngouso using solar lamps, the density of areas where solar energy is used in Yaoundé 3, especially in the campus of the University of Yaoundé 1 illustrate the extent to which this form of energy is integrating the daily lives of the surrounding populations. Found in the Centre Region and headquarters of the Mfoundi Division, Yaoundé is a town subdivided since 2007 into seven sub divisional councils. Yaoundé 3 has a surface area of 6834 hectares whereas Yaoundé 5 spans over only 2652 hectares. These administrative units created by presidential decree n°92/187 of 1<sup>st</sup> September 1992 making them new subdivisions are located between Latitude 3°42' and 3°58' North of the Equator and between Longitude 11°24' and 11°35' East of the Greenwich Meridian. These two subdivisions are bounded to the West by Yaoundé 1, Yaoundé 2, Yaoundé 6 sub-divisions and Mbankomo sub-division in the Mefou and Akono Division in one hand; the Ngoumou sub-division, the Soa sub-division in the Mefou and Afamba Division and the Yaoundé 4 sub-division on the other hand. These councils are all made up of urban and rural areas. This work concentrates only on the urban areas within the ambit of the exploitation of photovoltaic energy.





**Figure 1: The Yaoundé 3 and 5 Sub-Divisions in Cameroon**

This includes the Ngoa-Ekelle quarter, the administrative centre, the Mfandena, Ngouso, Mvog Ebanda quarters and the stretch of road running from Ngouso to the Mfoulou River, the boundary between Yaoundé 5 and the town of Soa. In order to understand the socio-economic gains and spatial implications of the exploitation of solar energy on the populations of Yaoundé 3 and 5, the study considers the role of public lighting on the development of trade, security, movement of people and goods and bus stops on the campus of the University of Yaoundé 1

Filed observations, survey by way of structured questionnaires and interview guides made it possible to gather points of view relating to the socio-economic implications of the availability of photovoltaic solar energy in the Yaoundé 3 and 5 sub-divisions. Then interviews granted to authorities of structures exploiting this energy as well as to the riverine populations at the supply points of solar energy without leaving out students and workers of the University of Yaoundé 1 brought a riche



understanding of the topic handled. Primary data was based on a survey of 300 students and different workers using the solar buses from time to time within the campus by way of structured questionnaire. This questionnaire was also administered to 280 riverine populations living along the road axes linking Yaoundé to its Soa outskirts in the Yaoundé 5 sub-division. The people surveyed were chosen based on their frequency to these between September 2016 and March 2017.

This questionnaire turned out to be insufficient and was completed by a perception survey using interview guides and analyses of filed observations. This contributed to the systematic assembling of direct or indirect information from beneficiaries of photovoltaic energy. This approach provided information on the socio-economic activities and their recurrence on these spaces since the installation of photovoltaic panels in their living environment as well as the intensity of social relationships that have developed.

Based on the data thus collected, the socio-economic position of the utilisation of solar panels was appreciated in the Yaoundé 3 and 5 sub-division. The data was thus treated using a systematic approach.

## **Results and analyses**

### **I-An appropriate physical and human potential for the production of solar energy**

Cameroon in general and the town of Yaoundé in particular has favourable physical and human conditions for the production and exploitation of solar energy.

#### **I.1-Favourable physical conditions**

The town of Yaoundé is situated on the Southern Cameroon Plateau that extends from latitude 2° to 6° north. This gives it the Guinean type of the equatorial climate, exposed to sunlight all the months of the year. According to results reiterated in the National Energy Plan (NEP), the southern part of Cameroon receives 4KWh/m<sup>2</sup>/d of sunlight, sufficient quantity of energy for the exploitation of photovoltaic and thermal solar energy. This becomes more possible as the photovoltaic panels are made up of photosensitive cells, meaning that they are sensitive to sunlight. In other words, photovoltaic panels are capable of capturing sunlight even during days with no sunlight, and charge the energy accumulators (batteries). In addition to the fact that the town of Yaoundé is surrounded by high summits, which are an advantage in the capture of sun rays, it can be observed that the climatic advantages and the relief of this area are many of the appropriate elements for the implantation of photovoltaic solar panels that can generate electricity from sunlight at a cheaper cost.

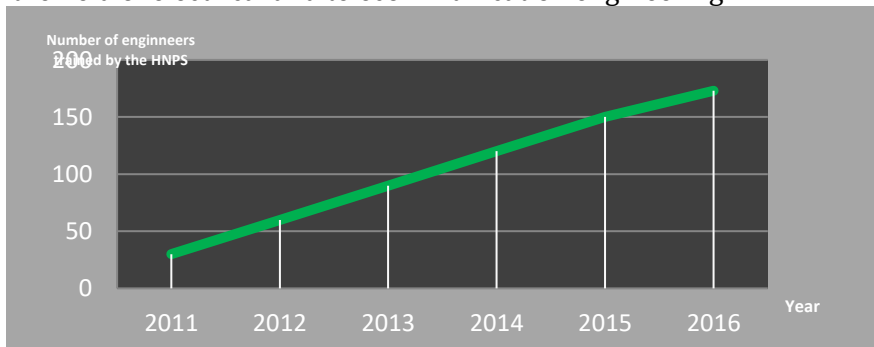
This situation is today increasingly given credence by the government that considers it as an opportunity to generally provide public lighting around the main roads and junctions of the town of Yaoundé and the environs. Despite the low potential exploited till today, an increasingly important place is being given to this source of energy in the advent of sustainable development. In all, the physical condition of the town of Yaoundé does not single handed explain the place occupied by solar panels in this space henceforth. In effect, in order to be used and manufactured, this technology requires minimum expertise.

## I.2- Significant human resources

Cameroon in Sub Saharan Africa is one of the countries with the highest rate of schooling. According to statistics from the National Institute of Statistics (NIS, 2008), the schooling rate in Cameroon is around 92%. In some areas such as the town of Yaoundé, this rate is close to 97.9%. This situation can be seen through the education infrastructures and a relatively efficient government policy in terms of the training of youths. It is for this reason that is found within the Yaoundé 3 sub-division a professional school specialised in the training of all sorts of engineers. So, in the domain of solar energy exploitation, the Higher National Polytechnic School of the University of Yaoundé 1 produces for the country a varied range of engineers who by their expertise are susceptible to help in the exploitation of solar energy through the manufacturing of photovoltaic solar panels. Within that school, there are buildings that are entirely supplied by solar energy using photovoltaic panels manufactured on the spot by these engineers.

This school has trained up till date several engineers who are experts in renewable energies. The increasing number of engineers trained by the H.N.P.S in renewable energy and solar energy in particular is an advantage to the Yaoundé 3 sub-division in particular and to the town of Yaoundé and Cameroon in general.

This Higher National Polytechnic School is one of the crucibles in the training of engineers, and in case of need, potential specialists in the domain of energy. This explains the presence of solar panels in its workshop and eventually those installed on a slab, close to the department of electrical and telecommunication engineering. This results in the number (figure 2) of engineers trained by this school between 2010 and 2016 in the field of electrical and telecommunication engineering.



Source: Field work 2016-2017

**Figure 2:** Number of engineers trained by the HNPS between 2011 and 2016 in the field of electrical and telecommunication engineering

From 30 engineers in 2010, the polytechnic school registers 625 expert trained till date. This growth demonstrates the will of the state to increase in quality and quantity the human resources destined to boost the energy sector. In addition, the increasing need for energy and the reduction of non-renewable, highly polluting fossil energy resources leads the government to envisaging new forms of energy for diversification of sources and for the promotion of sustainable development. This necessarily goes through the training of engineers and specialised researchers in the domains of renewable energies.

Besides, the Yaoundé 3 and 5 sub-divisions also benefit from the technical and technological potentials owned by Cameroon for the functioning of assemblages, sales

and the maintenance of solar equipment agents such as “Div Teck SARL” found in the Yaoundé 5 sub-division. In effect, this agency recruits technicians and engineers trained all over the national territory, that is originating from different public training institutions on renewable energy such as the Department of Rural Engineering of the Faculty of Agronomy and Agricultural Sciences (FAAS) of the University of Dschang; University Institute of Technology (UIT) of the same University, Higher National Institute of Agro-Industrial Sciences (HNIAIS) of the University of Ngaoundere as well as Higher Institute of Sahel (HIS) of the University of Maroua and the Laboratory of Energy Research (LER). On the spot in Yaoundé 3 and 5, the solar energy produced is exploited in several forms.

## **2- Different ways of using solar energy in Yaoundé 3 and 5**

Just to recall, photovoltaic solar energy is obtained from the transformation of solar rays into electricity through a physical process that takes place within the photovoltaic cells of solar panels. In the Yaoundé 3 and 5 sub-divisions, it is used by electric buses and public solar lamps.

### **2.1- Electric buses**

1. This is the most observable way of using solar energy in the Yaoundé 3 sub-division. Here, electric buses circulate within the University of Yaoundé 1 campus.

The “Bolloré Blue Solution” site is an ambitious project of about 1.4 billion CFA francs financed by the Bolloré group aimed at exploiting solar energy. This mini solar station covers a surface area of 2500m<sup>2</sup> and it is equipped with 288 photovoltaic panels supplied by the Total group. The energy captured is then stored by the Lithium batteries of the Blue Solution and eventually used. Each of these newer batteries has the capacity of 25KW/h. This makes it possible for the electric buses to be recharged directly, whose autonomy is more than 150 km per day. These 100% electric buses also called the Blue Buses are vehicles equipped with three blocks of Lithium batteries connected in parallel and supplying a total energy of 90KW/h. The blue bus has a capacity of 30 passengers and is accessible to peoples with disabilities. Apart from these electric buses, public solar panels can also be clearly distinguished.

### **2.2- Public solar lamps**

According to a study carried out by Global Village Cameroon in 2012, “photovoltaic solar energy is probably the type of renewable energy that is undergoing intense development in Cameroon for some years now. In the Yaoundé 3 and 5 sub-divisions, the population uses it through photovoltaic kits, the 100% electric buses in the University campus and especially the solar lamps installed along the stretch of road Ngouso-Soa (Photo 1) and of the military hospital around the reunification monument in Yaoundé 3.



Photo 1: **Solar lamps along the Ngouso-Soa road**

This photo demonstrates the public utility character of photovoltaic energy by the population of Yaoundé 3 and 5 sub-divisions. This involves the public lighting of some streets by solar lamps. Immediately, it becomes evident that solar energy is henceforth integrated into the lifestyle of the urban population of the Yaoundé 3 and 5 sub-divisions.

### **3- Socio-economic and spatial implications of solar energy production and consumption in Yaoundé 3 and 5**

Although still exploited embryonically in Cameroon, solar energy used in the Yaoundé 3 and 5 sub-divisions has undeniable socio-economic and spatial implications on this space especially in the town of Yaoundé in general. This situation is seen through public lighting, security of persons and their goods, the emergence of small businesses dependent on this lighting along streets, job creation as well as in the rate of movement of people within the campus of the University of Yaoundé 1 and relaying points along the itinerary followed by the electric buses.

#### **3.1- Enormous social fallouts**

##### **3.1.1 Public lighting**

Lighting using solar lamps ameliorates the daily lives of users of a street in the military quarters of Yaoundé 3 and those of the Ngouso-Soa corridor in the Yaoundé 5 sub-division. This lighting ameliorates the daily lives of users of the road be they vehicles, pedestrians or the surrounding populations. These beneficiaries go ahead to involve in leisure activities such as chance games “Paris Foot kiosks”. So it is noticed that the tarring of this road is an element that is added to solar energy to ensure social development and opening up of the population of the locality.

Investigating the level of satisfaction derived by the population from lighting using solar lamps on the streets of their quarters, the population of Mvog-Enbanda in the Yaoundé 5 sub-division demonstrated significant satisfaction from the exploitation of these solar lamps. This is far from expressing the change in the daily lifestyle of these populations ever since the installation of electric lamps in their neighbourhoods. Solar lighting is equally observable within the campus of the University of Yaoundé 1. Here, the recourse to photovoltaic panels associated with batteries in order to light up some buildings during power cuts is a profitable alternative to the use of generators. In effect, this photovoltaic system are easy to install, use and require no maintenance fee. This

makes it possible for an administrative and pedagogic building to be permanently lighted and at low cost.

### **3.1.2 -Promotion of security**

The surveillance camera is one “intelligent appliances” that makes it possible to permanently record all events that take place at a particular place by the surveillance camera initially installed and transmit the information to a command unit. Thanks to these cameras, the National Delegate for National Security (NDNS) has access to instant real time images of Yaoundé and other towns (Buea, Limbe, Douala, Garoua, Kousseri Garoua Boulay...). These cameras reflect the security fallouts from the exploitation of solar energy in Yaoundé and in other localities of the country. This is a project initiated in 2006, started in December 2014 and became operational in August 2016. These cameras are aimed at regulating and monitoring the circulation of people and their goods, follow up the activities of criminals and convoys as well as the organisation of big events. According to police officials, this pilot phase of the project is achieving its security aims. As such, thanks to solar energy, solutions to insecurity problems and banditry around areas where these cameras are implanted are found.

However, Cameroon in general and the Yaoundé 3 and 5 sub-division in particular are following the footsteps of developed countries through the application of video surveillance. This security apparatus that has been tested and proven elsewhere makes it possible for the National Delegate for National Security to achieve its objectives in terms of maintaining security.

This expresses the agreement signed on Thursday 16 February 2017 between the NDNS and the Chinese enterprise HUAWEI for the installation of 2000 cameras for supplementary video surveillance in the next 24 months in the headquarters of Regions before subsequently extending the installations into the frontier areas and the rest of the national territory. It should be underscored that the installation of solar lamps along the Ngouso-Soa road has contributed and still contributes in reducing insecurity along the said road; especially the reduction of aggression to the tune of about 75% since 2013 the date since which the solar lamps were installed on this previously unlighted stretch.

### **3.2- Considerable economic implications**

#### **3.2. Growth of economic activities**

In its actual form and exploitation, solar energy strongly contributes to the economic development of the populations of the Yaoundé 3 and 5 sub-divisions. This reality can be seen through commercial activities developed along the Yaoundé/Soa road as well as along other streets that are lighted by this source of energy in the town of Yaoundé. Besides, traders of drinking establishments as well as those of small businesses, telephone boots and accessories as well as small mobile shops benefit enormously from the lighting produced by solar energy in their activities such as: extension in the period of activity into the night, continuous activity in spite blackouts from ENEO. It can now be understood why these traders are increasingly concentrating around these solar lamps around major junctions along these streets. These commercial activities carried out in the night along the streets contribute to the social dynamics through the interaction between people on these spaces.

It is also observed that majority of commercial activities that develop around the immediate surroundings of the solar lamps on the Yaoundé/Soa road are in the informal sector. Besides, these activities are essentially made up of small businesses

that make it possible for the exchange of goods such as fruits and vegetables, tubers, grilled fish, grilled meat or “soya”, street medications, manufactured products (shoes, electronics etc.). Solar energy has come to survive small businesses in the absence of electricity supplied by ENEO agents.

### **3.2.2- Job creation**

In the Yaoundé 3 and 5 sub-division, thermic and photovoltaic solar energy create jobs. These jobs are generally skilled jobs that require a certain level of expertise. As such, despite their relatively large number, they are found at the opposite extreme of precarious jobs. Besides, direct employments are those offered by the exploitation of solar installation plants. This is the case with the mini solar plant of “Bolloré Blue Solution”. Here, there are 6 permanent drivers for the three electric buses, 15 security men as well as 48 technicians who ensure the maintenance and the renewing of materials. These jobs make it possible for them to integrate the economic and socio-professional circuit of the town of Yaoundé. It makes it possible for them to satisfy their different basic needs. However, solar electrification agents found in Yaoundé 3 and 5 such as Div Teck SARL employ about 30 technicians per day each. This represents about 200 permanent jobs generated by the exploitation of solar energy. These jobs are continuously increasing following the setting up of a policy aimed at increasing the consumption of solar energy in Yaoundé as these networks intensify in the other areas of the urban space especially in the peripheries. In addition, this number is bound to increase as Cameroon becomes conscious of the importance of the energy sector in the framework of its development.

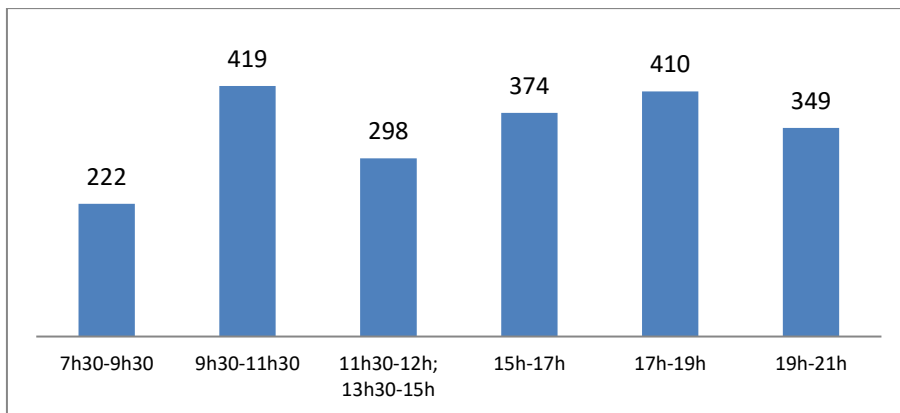
## **3.3- Significant spatial implications**

### **3.3.1 The movement of passengers in the University campus**

Concerning public means of transport, the “Bolloré” 100% electric buses, circulating in the University of Yaoundé 1 since 8 May 2014, contribute enormously to the wellbeing of students, teachers and the different staff within the campus. In effect, the use of electric buses within the campus makes it possible to assess the number of movements of people from one point of the University space to the other. Here, the Blue bus reduces the time spent by a student trekking to reach the lecture hall, reduction in physical stress and ensuring punctuality in class. All these elements indicate that apart from security, the use of solar energy also has implications in the area of education within the Yaoundé 3 and 5 sub-divisions. This initiative has a social connotation in the sense that the bus makes it possible for students and lecturers to freely and rapidly move to and from the four corners of the campus avoiding kilometres of trekking. This reduces tiredness, increases output and ensures efficiency in lecture halls whether on the part of students or of lecturers. The three buses found in the University space each serve seventeen stops in the whole campus from Monday to Friday as from 7am to 9:30pm with a midday break of one and half hours from 12 noon to 1:30pm. This bus has a maximum capacity of 30 passengers. According to statistics obtained from the service involved, 6000 person use these electric buses each day. The intensity of the passenger flow generated by the activities of these 100% electric “Blue buses” testify to the impact brought by their circulation on the daily lives of those who come to the campus of the University of Yaoundé I

These electric buses (plate1 photo 2) that go through the University campus and come out at the terminal bus stops each make 25 to rounds and 25 from rounds per day. This

corresponds to about 120km covered by a bus per day with each trip involving around 30 passengers. The peak of movement is observed between 9:30am and 11:30am. In effect, an average of 419 passengers enters and leaves the campus between 9:30 and 11:30 each day as against an average of 298 students and lecturers between 11:30 and 3:00pm. The average hourly movement of passengers that use the electric buses within the campus can be seen on figure 3



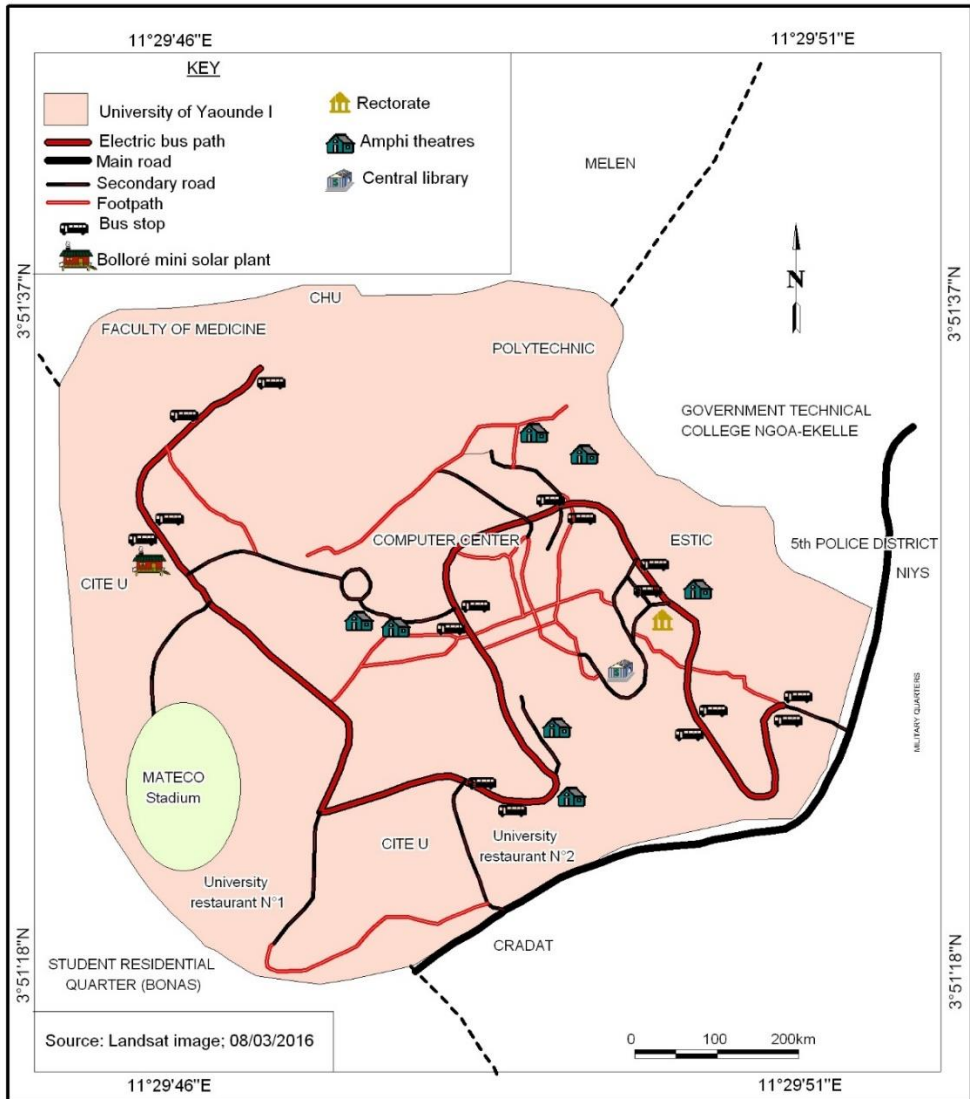
**Figure3: Daily intensity of hourly movement of passengers of the Blue buses within the campus of the University of Yaoundé 1**

The time period between 9:30 and 11:30am experience a very high daily average of electric bus passenger between the main entrance and within the campus mean while on the average the daily traffic is relatively low between 7:30 and 9:30am.

In effect, according to statistics from the Bolloré transport and logistics company, since their operation on the 8<sup>th</sup> of May 2014, the Blue buses have transported more than 3.045.331 passengers. So, the long queue of passengers (plate 1, photo 3) waiting for the arrival of the electric bus, the intensity of their daily (25 to and 25 from rounds) and weekly (Monday to Friday) activities speak volumes on the number of passengers transported as well as the distances covered till date. Therefore, the intensity of the flow varies according to the hour of assessment. It is important to point out that deviation between the maximum and the minimum flows is due to the very small number of the buses which is very insignificant compared to the demand from the passengers. It happens at times that several passengers are left behind when the capacity of the bus has been reached. This at times leads to frustration and shows the extent to which the services of the Blue buses are important to the daily lives of University students and workers. Apart from the flow of passengers from one point to the other, the itinerary (Figure 4) taken by the Blue bus within the campus of the University of Yaoundé I is a significant indicator of the importance of its services in the campus.

Beyond the simple itinerary followed by the electric bus within the University of Yaoundé I, a somewhat exact geographical location of the mini solar unit of the Bolloré Company is observed represented on the map as well as the bus stops. The map has been realised with the help of a satellite image obtained from Google Earth. So, apart from a single bus stop in between CHU and Polytechnic towards the north of the map, the others represent two bus stations on both sides of the path followed by the

electric buses serving the to and from movements of the buses giving a total of 17 bus stops.



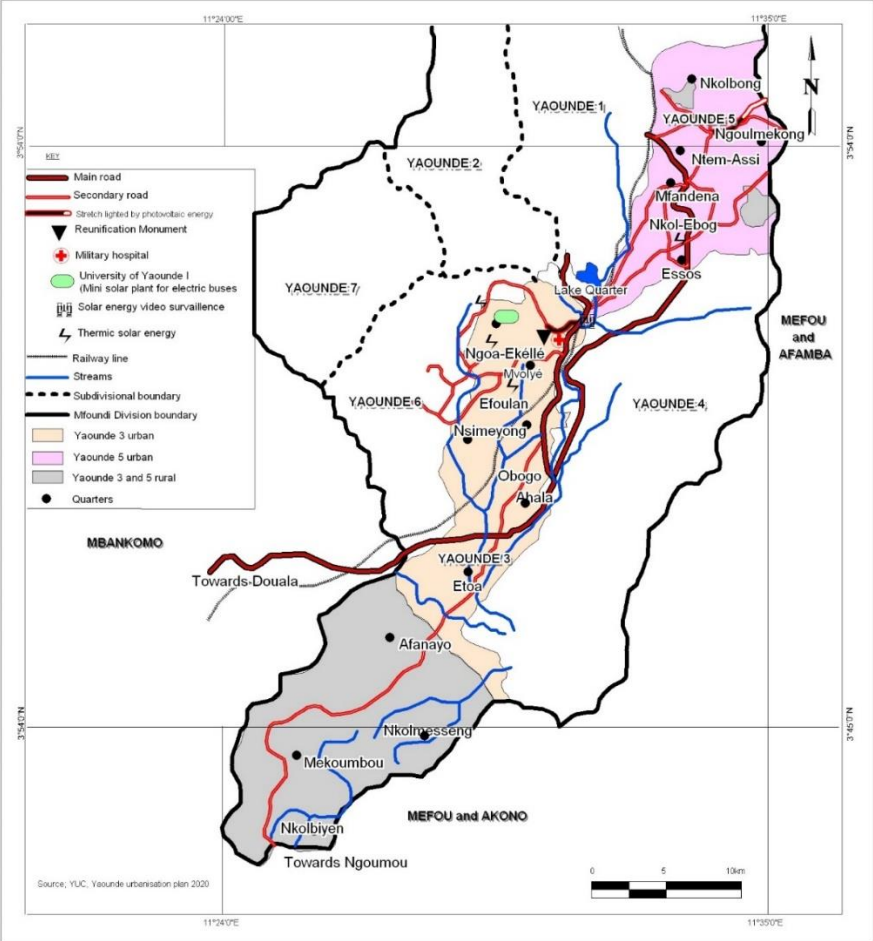
**Figure4:** Itinerary of the Blue bus within the University of Yaoundé I campus

### 3.3.2 -Exploitation points disseminated in Yaoundé 3 and 5

Field investigations clearly show the exploitation of photovoltaic solar energy in the Yaoundé 3 and 5 sub-divisions through the numerous and varied consumption points. These include both photovoltaic solar panels with public lights and video surveillance installations as well as some points for domestic usage such as electric water heaters etc. These utilisation and exploitation points of solar and thermic energy in the Yaoundé 3 and 5 sub-divisions are clearly shown on figure 5. These points are equally generally diversified. These are private residences, public places as well as public structures such as the university and health services. It is realised that solar energy is exploited and used in the Yaoundé 3 and 5 sub-divisions through several points and urban areas. It is the photovoltaic solar energy that makes it possible for



video surveillance cameras to function, streets lighted up along the Ngouso/Soa road in the Yaoundé 5 sub-division and at the Military hospital, the reunification monument, without leaving out the mini solar unit of the Bolloré group in the campus of the University of Yaoundé I at Ngoa-Ekelle in the Yaoundé 3 sub-division.



**Figure5:** Areas using solar energy in Yaounde 3 and 5

This also involves solar thermic energy that is used to heat water in some hospitals and reception centres. It is important to note that Ngoa-Ekelle and Ngouso/Soa predominantly student dominated areas are the principal experimentation, exploitation and utilisation centres of this new form of energy in the Yaoundé 3 and 5 sub-divisions in particular and the town of Yaoundé in general.

**Conclusion**

Looking at the environmental impacts induced by the exploitation of other forms of energy, solar energy is not only a less polluting source but equally that which is susceptible to causing less environmental degradation. The importance of solar energy is increasingly seen under the prism of the fight against poverty. In effect, this energy is a solution to the problems of low income populations who are living beyond

the ENEO electricity network. In addition, it makes it possible for Cameroon to adapt to the energy transition that is leading the world towards the green economy. Therefore, thanks to private and public initiatives, the rich natural and human potentials of Cameroon favour the exploitation of solar energy in the Yaoundé 3 and 5 sub-divisions for the socio-economic development of this geographic space. It is an activity that has unquestionable economic and social implications on the populations that benefit from it daily. There exist actual will powers of the Cameroon government to stimulate this form of energy using the quality of human resources, granted investments as well as the nature of the partnership solicited. The socio-economic and spatial implications of this activity are justified by its integration into the interrelation circuit of the Yaoundé landscape through the distribution of micro-enterprises throughout this space.

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## WELFARE OF THE ELDERLY IN TIMES OF PANDEMIC

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**Abstract.** The term Welfare is made up of two words, „good” and „state”, meaning prosperity. It is used mainly with reference to the characteristics of social systems that assume the responsibility to ensure the quality of life of members of society, in terms of physical health, mental health, education and social and economic security. The well-being of the population is ensured through social policies, laws and services offered to the whole society. Welfare systems, as opposed to social protection systems, are addressed to all members of society and are focused on preventing risk factors that lead to violations of social human rights, which would endanger the quality of life of all members of society. Elderly people are also among the recognized vulnerable categories. It is said about the „right to welfare” of the citizen as one of the positive human rights, of the second generation (the first generation of rights being civil and political). The notion of the right to welfare refers to the fact that every individual has the right to social assistance and services, and society is obliged to provide them. Like any „right”, the right to welfare of the citizen is ensured by the laws and regulations under which society operates.

**Keywords:** elderly people; well-being; resilience; Covid-19; social policies.

The COVID-19 pandemic has shown the human and financial cost of poor investment in health services among vulnerable groups in Europe. Disproportionately affected by unequal access to health and prevention services and with poor housing, living and working conditions, their poor health has led to greater exposure to the medical and economic effects of the pandemic (Otovescu, 2021).

Interpersonal relationships influence the physical and mental health of the elderly. One of the most important relationships of this kind is the marital relationship with the promise of a longer life for men, better health, a positive subjective well-being and fewer depressive symptoms for both sexes. Marriage can bring with it the improvement of healthy behaviors, the safety of a potential marital caregiver and increased financial resources, all of which promote physical and mental health. However, it is important to point out that, although research has shown that marriage has a protective character, it is not a rule applicable in all cases. Marital satisfaction is associated with physical and mental health, while marital stress, conflict or dissatisfaction are associated with weaker immune systems and high levels of depressive symptoms in both men and women. Studies have shown that the elderly have a better physical, mental, economic and social well-being than widows, divorced, separated or alone. (Șoitu & Rebeleanu, 2016: 89)

### **What is old age?**

Is old age a curse or a blessing? Why do so many older people face old age with the painful feeling that their lives have lost their meaning, that everything they had, what they were and what they cared for belongs to the past, that they are just an extra burden for the loved ones? How a man will feel in his old age depends not on external factors, but on ideas and how he lives. According to an old French saying, „every man

ages as he lived". How a man will feel in his old age depends on how he answers the question: „who am I?". If man, all his life, has identified with what he saw in the mirror, with his place in society and with what people say about him, in old age, when the beauty and power of the body diminish, and he inevitably loses his popularity. he will experience a great disappointment, a collapse of his soul. But if he aspired to become rich not in material goods, in power and glory, but in virtue, if during his life he acquired wisdom, kindness, meekness, patience, love, in old age he will enjoy a well-deserved respect and love. (Ciocioi, 2016: 87-89)

One thing is for sure: no matter how healthy we live, no matter how hard we try to stop the weather, we do not feel when we grow old: our powers, our sight, our hearing will weaken. We will be able to do fewer and fewer things and more and more efforts will cost us this, so we will increasingly narrow the scope of our actions, the circle of knowledge and our goals. We only have the opportunity to murmur or reconcile with ourselves, to reconcile with old age as a tragedy or as a blessing (Ciocioi, 2016: 99-100). Aging is a lifelong process. From a biological perspective, it is considered a result of the interaction between genetic, environmental and lifestyle factors that influence longevity. It is a set of phenomena that occur as a result of the end of the development phase and involve biological, psychological and social changes. The aging process manifests itself differently, individualization being determined by factors such as: degree of autonomy, physical and mental disorders, emotional state, the possibility of behavioral manifestation. Involvement in community life, how a person endures the loss of social roles, how they adapt to new social roles, sometimes as a result of the introduction of protection measures in residential care institutions are also defining factors in the manifestation the aging process. (Neamțu, 2016: 507)

The etymology of the word „old man" comes from the Latin language (veteranus = betranus). According to DEX (1998), „the elderly" is „that person who has lived for many years, past the age of youth, who is advanced in age". In today's Romanian society, when we mention the word elderly, we think of a person over 60 years, who has reached retirement age. Most of the time, the term is associated with a decrease in physical and sometimes even mental abilities. (Neamțu, 2016: 158)

Currently, several age-specific periodizations are used. From the perspective of the WHO in the twentieth century (1961), the following classification is presented:

- from the age of 45, middle age;
- average or transitional is up to 59 years;
- the elderly period, from 60 to 74 years;
- old age, after 75 years, specifying that persons over 85 years of age are considered long-lived.

The number of people aged 60 and over worldwide has increased from 200 million in 1953 to more than 600 million in recent years, reaching 17% in economically advanced countries, compared to 7% in more advanced regions. underdeveloped world. Europe's population has been aging steadily since 1950, with Europe considered the oldest continent. The statistics indicate an aging of the population in the period 1977-1992 by about 800,000 people, respectively by 2.6% simultaneously with the reduction of the population correlated by groups and, especially, of the young population up to 15 years old. It is found that the aging phenomenon is more pronounced in the female population, which has an increase of 3.8% compared to the male population. (Mândrilă, 2008: 8-20)

Romania supports people in need of social assistance, this being regulated by article 47 of the Romanian Constitution, an article that says the following: „Citizens have the right to pension, paid maternity leave, medical assistance in state health units, unemployment and other forms of public or private social insurance, provided by law. Citizens also have the right to social assistance measures, according to the law.”(<https://www.constitutiaronaniei.ro/tag/asistenta-sociala/>, accessed on 15.04.2021)

Social assistance is not only regulated by the constitution but also by certain laws, government decisions, emergency ordinances, ministerial orders that we list as follows:

1. Law 292/2011 on the regulation of the general framework for the organization, functioning and financing of the national social assistance system in Romania;

2. Law 17/2000 on the fact that the elderly have the right to social assistance, according to the provisions of the present law, in relation to the socio-medical situation and to the economic resources at their disposal;

3. Law 16/2000 on the establishment of the National Council of the Elderly, an autonomous, consultative body of public interest, in order to institutionalize the social dialogue between the elderly and public authorities, for the protection of the rights and freedoms of these persons.

4. Law 263/2010 on the right to social insurance which is guaranteed by the state and is exercised, under the conditions of this law, through the public pension system and other social insurance rights, hereinafter referred to as the public pension system;

5. GD 886/2000 for the approval of the national grid for assessing the needs of the elderly;

6. GD 1317/2005 on supporting volunteer activities in the field of home care services for the elderly;

7. GD 867/2015 on the legal framework for establishment, organization and operation, the principles underlying the provision of services, main functions and activities, access conditions, rights and obligations of beneficiaries, organizational structure, number of positions and categories of staff- Nomenclature of social services;

8. Order 29/2019 which focuses on the approval of minimum quality standards for the accreditation of social services for the elderly, the homeless, young people who have left the child protection system and other categories of adults in difficulty, as well as for community services, integrated services and social canteens (<https://mmuncii.ro/j33/index.php/ro/2014-domenii/familie/politici-familiale-incluziune-si-asistenta-sociala/5427>, accessed on 16.04.2021).

## **Legislation for the services provided**

### **1. Quality assurance in the field of social services:**

a. Law 197/2012 - on quality assurance in the field of social services;

b. GD 118/2014 - for the approval of the Methodological Norms for the application of the provisions of Law 197/2012 regarding the quality assurance in the field of social services;

c. Emergency Ordinance No. 51/2017 of June 30, 2017 for the amendment and completion of some normative acts.

## **2. The contract for the provision of services:**

a. Order 71/2005 - regarding the approval of the model contract for the provision of social services, concluded by the public social assistance services with the social service providers;

b. Order 73/2005 - regarding the approval of the model contract for the provision of social services, concluded by the social service providers, accredited according to the law, with the beneficiaries of social services.

## **3. Evaluation grid:**

a. GD 886/2000 for the approval of the National Grid for assessing the needs of the elderly;

b. Order 491/2003 - for the approval of the Grid of medico-social evaluation of the persons who are hospitalized in medical-social assistance units;

## **4. Representative bodies:**

a. Law 16/2000 - on the establishment, organization and functioning of the National Council of the Elderly;

b. GD 499/2004 - on the establishment, organization and functioning of the Consultative Committees for Civic Dialogue for the problems of the elderly, within the prefectures;

c. Law 27/2011 - for the amendment and completion of law no. 16/2000 regarding the establishment, organization and functioning of the National Council of the Elderly.

## **5. Granting of subsidies:**

a. Law 34/1998 - on granting subsidies to Romanian associations and foundations with legal personality, which establish and administer social assistance units;

b. GD 725/2016 - regarding the amendment and completion of GD no. 1153/2000 for the approval of the Methodological Norms for the application of the provisions of Law no. 34/1998 on granting subsidies to Romanian associations and foundations with legal personality, which establish and administer social assistance units;

c. Annex - Methodological norms for the application of the provisions of Law 34/1998 regarding the granting of subsidies to Romanian associations and foundations with legal personality, which establish and administer social assistance units.

## **6. Social assistance:**

Law 292/2011 - Law on Social Assistance.

## **7. Legislation on social assistance for the elderly:**

Law 17/2000 republished 2010 - on social assistance for the elderly.

## **8. Voluntary legislation:**

a. Law 195/2001 republished 2007 - Law on Volunteering;

b. Ordinance 58/2002 - for completing and amending the Volunteering Law 195/2001.

## **9. Nomenclature legislation in social assistance:**

GD 867/2015 - for the approval of the Nomenclature of social assistance institutions and of the indicative personnel structure, of the Framework Regulation for the organization and functioning of social assistance institutions.

**10. Legislation minimum quality standards:**

Order 29/2019 regarding the approval of the minimum quality standards.

**11. Legislation minimum cost standards**

GD 978/2015 - on the approval of the minimum cost standards for social services and the monthly level per family member based on which the monthly maintenance contribution due by the legal supporters of the elderly in residential centers is established.

**12. Active aging strategies:**

a. GD 566/2015 - on the approval of the National Strategy for the promotion of active aging and the protection of the elderly for the period 2015-2020 and of the Strategic Action Plan for the period 2015-2020;

b. Annex 1 - National Strategy for the Promotion of Active Aging and the Protection of the Elderly 2015-2020. (Măță, 2017: 30-31)

Depending on the personal situation of the beneficiaries and the problems they face, the elderly can be at the same time disadvantaged people, people with disabilities, pensioners, etc. Thus, in the field of social assistance for the elderly, specific normative acts can be taken into account in areas such as: pensions and other forms of social benefits, social health insurance, services for people with disabilities, services for disadvantaged people, etc. (Gîrleanu & Șoitu, 2010: 137)

**The life of the elderly man in pandemic times**

We are, for the first time, contemporary with the first *live pandemic*. The pandemic is experienced by many through delegation. For a significant number of us, the pandemic is what is presented on the various communication platforms. At first glance, it is a communicated reality that later comes to life. There are measures, regulations and information circulating, all mixed with a substantial dose of emotion, inevitable in extreme situations. Basically, the pandemic reality in the era of generalized communication acquires other faces, different from the reality itself. Words translate some thoughts, take on meaning, have different resonances. They turn into behavioral patterns so that, in the end, some of them become institutionalized and take on a tangible face. The phenomenon we are experiencing today is extremely interesting. It is under the sign of globality. We live in the era of *generalized communication* a global phenomenon by its nature (*pandemic*). We are developing a communication of pandemic proportions, an *infodemia*, as it has been called by some. We could say that the current pandemic owes its existence as much to communication as to the virus itself. Consequently, reality, constructed or not, should also be global, generalized and generalizing. Well, that's not the case. (Gavriliuță, C., 2020: 229-246)

For some of us, the quarantined time of the last few months has also meant the unseen struggle with the ghosts of danger. Collective fears have long been reactivated, long forgotten and officially passed in the penumbra areas of life. I personally know that our social representations of the danger of contamination with the Covid virus - 19 are often exaggerated. I do not minimize the risk of illness at all. I'm just saying that our personal fantasies (fear, panic, anxiety) can be (sometimes) more dangerous than the actual infection with the virus. (Gavriliuță, N., 2020: 93)

The phrase „anti-emptying struggle” was uttered to the point of saturation during this period, so that it lost any meaning that would indicate a dramatic situation for many of us. Along with all this, in the online environment and on social networks circulates a lot of information, news, articles, comments and opinions, in a chaotic and motley manner, the entire media picture. Beyond the specificity of the virus, what is truly a novelty is the unprecedented media coverage of this plague, the first in the digital age. Regardless of the critical areas, regardless of the existing outbreaks on the planet, we live the epidemic live, by connecting to the media and the multitude of existing information. There is talk today of an *infodemia*, this being the first experience of its kind on a global scale. We produce and consume information on the subject of the pandemic to the point of supersaturation, on all channels and in the most different ways. (Gavriliuță, C., 2020: 229-246) The scale of the phenomenon is difficult to perceive and is obviously blurred by our own realities and experiences. In addition, the incongruity of official messages and the circulation of contradictory figures or news haunt the public's receptivity. The same happens with the insistent commercials asking for „wearing the mask correctly” and respecting the „social distance”: „Be responsible, stay at home!”, „Be responsible, keep your distance!”, „Be responsible, wear a mask!” If at the beginning of the pandemic the strategy paid off, spreading fear rather than a sense of responsibility, today the formulas previously invoked become dry clichés. They are not loaded with a real understanding of the phenomenon, which could (could) generate a genuine change in behavior. (Gavriliuță, C., 2020: 229-246)

In conclusion, it is not at all simple or easy to live with the pan-demon Covid 19. For most of us, the last two months have meant a protective self-isolation in our own family. How do we resist attacks by the new virus? Praying to God, taking care of our family and us, working and, above all, trying to give a spiritual meaning to our lives. (Gavriliuță, N., 2020: 93-94)

### **Interventions in the community to increase the well-being of the elderly**

A. Limiting the spread of COVID-19 among the elderly through the social care service for the elderly at home provided by the Association of St. Voivode Stefan cel Mare - Hârja, Bacău County

In the context of the population's illness with the new coronavirus (COVID -19), the Association „St. Voivod Ștefan cel Mare – Hârja” undertook many social and socio-medical assistance activities in order to limit the spread of the coronavirus pandemic and support vulnerable people during this period, coming to the aid of hundreds of vulnerable elderly people.

The general objective of the project implemented by the Ministry of Labor and Social Protection through social service providers was to increase the quality of life and combat situations of risk and vulnerability for the elderly and people with disabilities at home or at risk of restrictions and travel difficulties.

The specific objectives took into account:

Increasing the quality of life and combating situations of risk and social exclusion for at least 100,000 elderly people and people with disabilities (at national level), in the context of the COVID-19 pandemic;

Increasing the capacity of at least 1000 public authorities to respond to the needs of vulnerable people in the context of the COVID-19 epidemic.



Following the submission of the necessary documents, the Association „St. Voivod Ștefan cel Mare – Hârja” was chosen as a partner in the implementation of the project within the Doftana and Bîrsănești ATUs, involving 2 social workers of the institution. During the 6 months of implementation, September 2020 - February 2021, 5 visits were made to the homes of the 200 beneficiaries. The visits consisted in providing material, moral and social support through counseling and information activities, as well as through activities of offering free of charge some packages that consisted of disinfectant materials and products.

The total cost of the project was 160,280 lei, of which 93,000 lei were used to purchase disinfectants and protective materials: masks, gloves, disinfectant liquid soap, surface disinfectant, antibacterial solid soap, sanitary alcohol, disinfectant wipes surfaces, pocket wet wipes, hand gel, Domestos, clothes disinfectant, multisurface spray disinfectant. The rest of the money was used to pay the transport costs in Doftana and Bîrsănești, as well as to pay the social workers involved in the project. The project, at the level of proposed objectives and activities, also had disadvantages. The main needs of disadvantaged people living in poverty, with varying degrees of disability, living in crowded housing and having chronic illnesses are related to basic necessities, medicines, counseling and information and only then to disinfectants and cleaning equipment. protection against COVID-19. Although the project did not address these needs and focused only on counseling and protective materials, the institution managed to provide all 200 beneficiaries with the most necessary food: bread, sugar, rice, frozen meat, pasta, preserves, sausages, cheese melted and sweets. The food was purchased from the institution's financial resources.

#### **B. Statistical report of the social and socio-medical assistance activities within the Archdiocese of Roman and Bacău, in a state of emergency, in the context of the coronavirus pandemic (COVID-19)<sup>1</sup>.**

At the level of the Archdiocese of Roman and Bacău, the Social and Medical Assistance Sector, through archdioceses, religious units and diocesan NGOs, intervened in diocesan communities to limit the spread of the pandemic with the new coronavirus (COVID 19) through several methods and techniques intervention.

##### **1. Description of the intervention mechanism at the diocesan level**

One of the methods used was the taking over of the requests addressed to the diocese through the calls sent to TelVerde (0800800368) established by the Romanian Patriarchate. Out of the total number of 7187 requests received at the Diocesan Sector of social and medical assistance, 127 calls were received through Tilverde of the Romanian Patriarchate. The delegate of the Social and Medical Assistance Sector who also managed the diocesan call center telephone line (0749666581), inventoried all the requests coming from the diocesan communities, sent through the Romanian Patriarchate, DGASPC Bacău, Bacău County Council, Bacău Prefecture, , religious units and diocesan NGOs. A platform through Google sheets was used, an interactive excel table, with the situation of requests, needs and interventions in real time. The table contained the personal data of the applicant, who takes over the request, the identified need, who intervenes and to what extent the request was resolved.

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<sup>1</sup> Activity report was made by Fr. Ilarion Măță, Diocesan Counselor at the Assistance and Medical Sector within the Archdiocese of Roman and Bacău, submitted to the Romanian Patriarchate on 22.05.2020 (registered at the Chancellery of Roman number 893). The project took place between March 20 and May 15, 2020.

## **2. Supported beneficiaries**

From a total of 7187 people helped, we can classify the support as follows:

- 547 people placed in isolation;
- 149 people in quarantine;
- 5538 elderly people alone (left without support, due to the measures imposed during the state of emergency);
- 953 social cases (which were in the records of the diocese before the pandemic and which were further assisted).

## **3. Donations to medical institutions**

The institutions that received protective equipment (masks, visors, goggles, overalls, gloves, boots) and disinfectants were the 8 Hospitals in Bacău County (Bacău County Hospital, Bacău Pneumoftiziologie Hospital, Onești Municipal Hospital "St. Dr. Luca of Crimea", Moinești Emergency Hospital, Comănești City Hospital, Buhuși City Hospital, Podu Turcului City Hospital), Roman Municipality (Roman Municipal Hospital), Ambulance Services from Bacău, Onești, Moinești and Comănești.

Medical equipment donated to health institutions in the diocese:

- Disinfection tunnel for the Hârja socio-medical services complex;
- Monitor of ROOT vital functions with NIPB - Bacău Pneumoftiziologie Hospital
- 2 infusomes Alois GW 800 - Bacău Pneumoftiziologie Hospital;
- 3 RAD 5v pulse oximeters - Bacău Pneumoftiziologie Hospital;
- 4 TIR thermometers 1 - Bacău Pneumoftiziologie Hospital;
- 2 Alaris GH injectors - Bacău Pneumoftiziologie Hospital;
- Monitor of vital functions - „St. Dr. Luca of Crimea” Onești;
- Vital functions monitor - Buhuși Hospital;
- 300 overalls, 4000 masks, 100 visors - Hospital from Comănești, Moinești, Roman, Onești, Moinești, Comănești Ambulance Services, Tg. Ocna;
- Disinfectant container - Onești ambulance service;
- Utility disinfection device - Bacău County Ambulance Service;
- Disinfectants (for all activities of the 427 volunteers);
- Hygienic and sanitary products - Neonatology and Pediatrics Departments (Bacău County Hospital);

## **4. Special social programs carried out by the diocese**

- a. „Those in the Cathedrals help Hospitals!”;
- b. „Love your neighbor as yourself!”;
- c. „Supporting the elderly in Bacău County, as a result of the spread of COVID-19”, a project developed by the Bacău County Council.

*Common results obtained following the implementation of the three diocesan projects:*

7187 requests were registered through the call center of the Diocesan Sector of social and medical assistance, the emergency telephones of DGASPC Bacău, the email or addressed to the minister priests, the archpriests and the representatives of the diocesan NGOs.

The parishes that carried out actions in the community numbered 308 and 997 employees of the religious units and volunteers were involved during this period in the diocesan projects.

The financial report consists of the allocation of the amount of 603,085 lei for the following expenditure chapters:

- hot food: 129,128 lei;
- food packages: 260,589 lei;
- bottled water: 16,623 lei;
- first aid purchases: 9,175 lei;
- payment of utility bills: 8,421 lei;
- medical services: 15,988 lei;
- donations of hygienic - sanitary products: 70,181 lei.
- donations of medical equipment: 92,980 lei;

Parishes, archdioceses and diocesan NGOs were involved daily in supporting many vulnerable people, especially isolated and sick elderly people in 238 rural and urban communities.

All those interested in supporting the social and socio-medical assistance actions of the Archdiocese of Roman and Bacău, were asked to call 0800800368 (Tel Verde initiated by the Romanian Patriarchate) or 0749666581 (call center of the Social and Medical Assistance Sector of the Romanian Archdiocese and Bacău), and the volunteers enroll in the socio-medical intervention programs of the diocese at the email address [voluntariarb@gmail.com](mailto:voluntariarb@gmail.com).

All the necessary information and the way to support financially, with food or hygienic-sanitary products and through social volunteering, were found on the humanitarian platform of the Social and Medical Assistance Sector of the Archdiocese of Roman and Bacău [www.ajutamimpreuna.ro](http://www.ajutamimpreuna.ro), launched on 1 May 2020, specially created to support health facilities, medical and care staff, volunteers of archpriests, parishes and diocesan NGOs, especially the most vulnerable people in the diocese.

**All these projects, mentioned above, will continue until the eradication of the pandemic in our country.**

The Social and Medical Assistance Sector, starting with 05.05.2020, with the support of archdioceses, religious units, diocesan NGOs, legal entities or donors, proposes the following three diocesan programs:

- Diocesan program dedicated to the support offered to clergy and their families,

**Families of clergy above all**

General objective: Through this self-help program, we will support the families of priests in very poor food parishes, the payment of utility bills and the purchase of electronic devices for children.

- **Donation for education**

General objective: Collection of new or used but functional electronic devices (tablets, smartphones, laptops or computers) for the children involved in the "Online School" Program.

- **We equip hospitals together with medical equipment**

The general objective: to continue supporting the endowment of the sanitary units with medical equipment.

**5. Social services of the cult units / NGOs that function with the blessing of the hierarch who have oriented / modified their activity in order to come to the aid of the people affected by the pandemic and of the medical staff**

The Archdiocese of Roman and Bacău has managed to prioritize the provision of socio-medical services according to the immediate needs of people affected by the spread of the pandemic, so that:

- licensed specialist healthcare (including medical recovery) and social support and home care services intervened in 243 cases;

- the licensed social canteen services provided 6456 portions of hot food to people in preventive isolation (especially the elderly and large families), staff employed in ambulance services and other categories that required urgent intervention;

- the counseling and support service for parents and children provided telephone counseling for 324 people and financially and materially supported 1537 people from disadvantaged families;

- the ambulance service intervened in 87 telephone requests directly or through collaborators;

- 435 members of the youth and volunteer centers were involved in the purchase of non-perishable food, medicines, delivered hot food at home, paid utility bills and counseled vulnerable people by phone (especially the elderly).

## **6. Institutions with which partnerships have been concluded (authorities, medical institutions)**

The Archdiocese of Roman and Bacău, through archdioceses, religious units and diocesan NGOs, has entered into partnerships with the 8 Hospitals in Bacău County (Bacău County Hospital, Bacău Pneumoptphysiology Hospital, Onești Municipal Hospital "St. Dr. Luca of Crimea" of Emergency Moinești, Comănești City Hospital, Buhuși City Hospital, Podu Turcului City Hospital), Roman Municipality (Roman Municipal Hospital), Ambulance Services from Bacău, Onești, Moinești and Comănești.

At the same time, he elaborated and initialed social volunteering projects with the Faculty of Orthodox Theology from Iași and with the Theological High School "Episcop Melchisedec" from Roman.

He received financial or material support through sponsorship contracts, from SC Agricola International, Hotel Perla Sălănic Moldova, Hotel Trotuș Onești and from other partners who wished to remain anonymous.

Collaboration partnerships for community interventions were concluded with Bacău County Council, Bacău Prefecture, together with other secular NGOs with which the intervention area was shared, such as: Community Support Foundation, Red Cross - Bacău branch and Lumina Association.

## **7. Social services whose activity has been majorly affected by the measures imposed during the state of emergency**

All socio-educational services (children's day center type) were temporarily closed due to military ordinances.

Outpatient centers were also closed due to restrictions imposed by medical regulations imposed by the spread of the pandemic.

The activities of medical offices, day addiction counseling centers have also been suspended.

At the same time, the residential centers for the elderly could not be admitted due to the risk to which the residents are exposed, and the medical and care staff were

pre-emptively isolated at work for 70 days, the accommodation and meals costs being borne until present, by the church institutions, providers of socio-medical services.

The Archdiocese of Roman and Bacău, as well as all the dioceses within the Romanian Patriarchate, have made considerable efforts, being one of the strongest social partners of the communities affected by the spread of the pandemic. Although places of worship were closed to believers and priests were limited in direct activities to parishioners, however, the Romanian Orthodox Church showed loyalty to its faithful, with great sacrifices and risks financially, socially and even medical.

### **C. Implementation of the county project „Supporting the elderly in Bacău County, as a result of the spread of COVID-19”**

The association „Saint Voivode Stephen the Great – Hârja” was requested to represent the Archdiocese of Roman and Bacău, through the association contract with the county public authority, the County Council and DGASPC Bacău.

As a single association cannot be involved in all the communities of Bacău county, for a more consistent involvement and with a wider geographical coverage, partnerships were concluded between the association from Hârja and the archdioceses of Bacău, Onești, Moinești, Buhuși and Sascut, as well as with diocesan NGOs: Christian Association of Charity and Aid (ACCA) Ovidenia Bacău 2005, Association „Trinity of Bishops” Bacău, Association of Saint Anastasia Romana - Tg Ocna, Association Philanthropy Oneșteană, Association WISED NGO Dărmănești, Suroti Association – Casin Monastery , Grozești - Oituz Association, „Mereu cu Sfinții Voievozi” Association - Răchitoasă Monastery and „St. Ilie” Association - Poiana Sărată.

The social and medical assistance activity carried out by the Archdiocese of Roman and Bacău, together with the Bacău Community Support Foundation, the Bacău Red Cross and the Lumina Association, can be summarized as follows:

1. Call center calls - 1829 for the following services:
  - 217 people benefited from purchases made by volunteers;
  - 1829 people received information;
  - 56 people benefited from telephone counseling;
  - 1112 people received help in food from donations (Pambac packages, yogurt, pressed ham, bread, etc.);
  - 35 people benefited from the purchase of prescription and medicines;
  - 207 people received hot meals;
  - 97 people received various help or requested only information (others: bed linen, medical equipment, etc.);

There are people who have received multiple aid, in this case the predominant category of aid has been taken into account.

2. Requests for the provision of home care services (immobilized elderly):
  - 480 elderly people cared for at home (average / day)
3. Medical assistance / recovery:
  - 192 elderly people received daily or constant medical assistance / recovery through specialists.

Total number of supported elderly – 2401.

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# CURRENT CHALLENGES REGARDING THE PRESERVATION OF NATIONAL IDENTITY IN THE ROMANIAN DIASPORA

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**Abstract :** *The phenomenon of massive emigration of Romanians in recent decades has led to the formation of a vast diaspora of over 3 million people in Western Europe. Preserving national identity is a major challenge for these communities. The article analyzes the factors that threaten the persistence of Romanian identity, such as long-term assimilation tendencies, language barriers, the weakening of ties with Romania or the persistence of negative stereotypes. The individual strategies of diaspora organizations and the Romanian state to protect identity values are also discussed. The need for coherent public policies and the mobilization of civil society is argued for the preservation of the Romanian cultural heritage among the new generations of Romanians abroad. Defending national identity in the diaspora is a major strategic stake.*

**Key words :** *migration, theories, sociology, world system, networks, human capital, transnationalism*

## 1. Introduction

The phenomenon of emigration of Romanians in large numbers to Western European states gained momentum especially after Romania's accession to the European Union in 2007. According to the data of the National Institute of Statistics, there are currently over 3.6 million Romanians residing outside the borders, most in Italy, Spain, Germany and Great Britain (INS, 2021). This migratory wave, unprecedented in the modern history of Romania, led to the formation of a vast Romanian diaspora in Europe.

The long-term integration of this diaspora represents a challenge not only from an economic and social point of view, but also culturally. The preservation of Romanian national identity and values is a difficult objective for Romanian communities abroad. As years and generations pass in the countries of adoption, the threat of complete assimilation and loss of Romanian identity becomes more acute (Gil, 2017).

This article aims to analyze what are the main challenges and threats to the preservation of the Romanian national identity among the diaspora. The strategies and mechanisms used by individuals, civil society organizations or the Romanian state to counteract these assimilative pressures are also discussed. The preservation of national identity is important both for maintaining the symbolic link with the motherland and for resisting discrimination in the host countries (Marcu, 2011).

The challenges are multiple and require coherent public policies, but also the mobilization of civil society to protect the Romanian cultural heritage among the more than 3 million Romanians in the diaspora. Otherwise, the diaspora risks irreversibly losing its belonging to the Romanian identity, with major long-term cultural consequences both for Romanians abroad and for Romanian society itself.

## 2. Factors that threaten national identity

A first major factor that threatens the persistence of the Romanian national identity among the diaspora is represented by the natural tendency of long-term cultural assimilation

in the countries of residence (Sandu 2010). The longer the period of stay outside Romania's borders, the stronger the external pressures and influences on the traditional Romanian identity.

Assimilation mechanisms are complex and multidimensional. They include the gradual adoption of the language of the host country to the detriment of Romanian, the loss of specific customs and rituals, the change of culinary or clothing tastes, adaptation to the social norms and cultural values of the adopting society, etc. All this erodes over time the loyalty to the traditional Romanian identity symbols.

A study by the sociologist Dumitru Sandu shows that after approximately 8-10 years spent outside the country's borders, the national identity of Romanian emigrants begins to become increasingly diluted and less important in the individual identity construction (Sandu 2010). The pressures of cultural conformity become difficult to counter.

A particularly great threat is the one represented by the linguistic barriers in the way of the transmission of national identity to the young generations, already born abroad (Marcu 2011). Children from the diaspora intensively learn the language of the country of residence in schools, and their communication skills in Romanian remain limited or even non-existent. Thus, they are largely disconnected from the Romanian cultural heritage that their parents can no longer pass on effectively.

Another factor that gradually weakens the symbolic belonging to the national identity is the dilution of contact with Romania, both on a family and wider social level. Once integrated in the countries of adoption and breaking ties with the motherland, the idea of Romanian identity fades over time (Gil 2017).

Finally, the persistence of negative stereotypes about Romanians in some European societies creates pressure to reject national identity and mimetic adaptation to the culture of the host countries, in order to avoid discrimination (Marcu 2011). Thus, the preservation of identity becomes not only a complex process, but also a socially costly one for the diaspora.

### **3. Identity preservation strategies**

In an attempt to counteract the multiple assimilation pressures, a series of individual and collective strategies were implemented to preserve the Romanian national identity among the diaspora.

At the individual level, the most common tactics include maintaining close ties with family and friends in Romania through phone calls, electronic correspondence, or recurring visits. Also, many migrants expose their children to elements of Romanian culture such as music, films, literature to compensate for external influences (Gil 2017).

Associations and organizations of the diaspora also play an essential role in preserving identity through events such as Days of Romanian Culture, festivals of Romanian Datins, language courses, artistic ensembles or publications in the Romanian language. For example, the ProFamilia Association in Rome periodically organizes creative camps for Romanian children with educational activities in Romanian.

The churches frequented by the diaspora, especially the Orthodox ones, also represent important vectors for the transmission of Romanian identity values, through services in Romanian, readings from traditional religious literature, songs or specific church paintings (Marcu 2011).

On the part of the Romanian state, efforts were made such as the establishment of bilingual sections in schools in the diaspora, the sending of Romanian language teachers or school textbooks for the children of emigrants. However, the impact of these initiatives has so far been limited, requiring more coherent long-term public policies to support the national identity of Romanians abroad.



#### **4. Cultural policy model for preserving the identity of Romanian communities in the diaspora**

Preserving the Romanian national identity represents a major challenge for the Western European diaspora, which counts more than 3 million Romanians settled in recent decades in countries such as Italy, Spain, Germany or Great Britain. According to the integration in the adopting societies and the passing of the years, the essential values of the Romanian identity are increasingly threatened among the new generations.

That is why it is necessary to develop a coherent public policy on the part of the Romanian state to support the preservation of national identity symbols in the diaspora. Through such a strategic approach, the danger can be counteracted that, over time, Romanian communities outside the borders will completely lose their ties with the Romanian identity and culture.

One of the main directions of action should aim at supporting the learning of the Romanian language by children already born abroad. By establishing bilingual departments in schools with a large Romanian population, sending teachers from Romania, developing appropriate textbooks or summer camps in Romanian, young people can acquire the necessary skills to access the Romanian cultural heritage.

Also, the Romanian state should finance concrete cultural programs such as festivals of Romanian traditions, artistic ensembles or publications distributed in the diaspora. The involvement of civil society, especially NGOs and churches frequented by Romanians, is also essential for the success of the effort to preserve identity.

In addition, to combat the prejudices that discourage the assumption of Romanian identity in some states, campaigns to promote the image of Romanians in the local media and the establishment of a Day of Romanians would be necessary. Monitoring discrimination and reporting to local authorities are also appropriate tactics.

The implementation of such an integrated model of public policy regarding the preservation of the national identity of Romanians in the diaspora requires substantial budgetary resources, but also the coordination of the institutions of the Romanian state with civil society. The long-term results could be the significant increase in the number of young people from the diaspora who learn the language and know the Romanian culture, as well as the maintenance of national identity symbols for future generations of Romanians abroad.

#### **5. Conclusions**

The phenomenon of Romanian migration to Western European states in recent decades has led to the formation of a vast and dynamic diaspora of over 3 million Romanians. The long-term integration of this diaspora represents a complex challenge not only economically and socially, but also from a cultural perspective.

Preserving Romanian national identity, values and symbols is a difficult objective in the context of assimilation pressures from the countries of adoption. As shown in this article, the threats to the persistence of the Romanian identity are multiple and insidious.

The natural tendency of cultural integration increasing with the passage of time spent outside the borders exposes the diaspora to a gradual process of erosion of traditional Romanian references. Language barriers threaten the transmission of cultural heritage to children already born abroad.

The increasingly reduced contact with Romania dilutes the feeling of symbolic belonging to the Romanian nation. And the persistence of negative stereotypes in some host societies generates pressures of mimetic cultural adaptation. All these factors act synergistically and in the long term risk leading to the almost complete loss of the Romanian identity of the future generations in the diaspora.

To counteract this danger, various individual and collective strategies have been implemented to preserve identity values. The efforts of civil society and the Romanian state have registered certain results, but they still remain insufficient compared to the amplitude of the challenge.

Much more coherent public policies and integrated programs, consistently supported in the long term, are needed to effectively protect the Romanian cultural heritage among the more than 3 million Romanians in the diaspora. Otherwise, the gradual but inevitable assimilation over generations will lead to the irreversible dilution of the national identity of a large part of the Romanian communities abroad.

And this loss would have consequences not only on the diaspora itself, but also on Romanian society as a whole. That is why the defense of the national identity of Romanians outside the borders must represent a strategic priority both from a cultural perspective and for long-term national security reasons. The stake is high and concerns the very essence of modern Romanian civilization.

Future challenges will require sustained efforts from the Romanian state through dedicated policies, but also a broad mobilization of civil society organizations and Romanians everywhere. The preservation of national identity in the diaspora must once again become a common project that unites the efforts of all those concerned with the promotion of Romania's cultural heritage, regardless of their political or ideological options.

Only through a broad civic-public partnership will it be possible to ensure the effective and long-term protection of the Romanian identity among the more than 3 million compatriots settled today outside the country's borders. And the successful achievement of this goal will strengthen not only the diaspora, but the Romanian national community itself.

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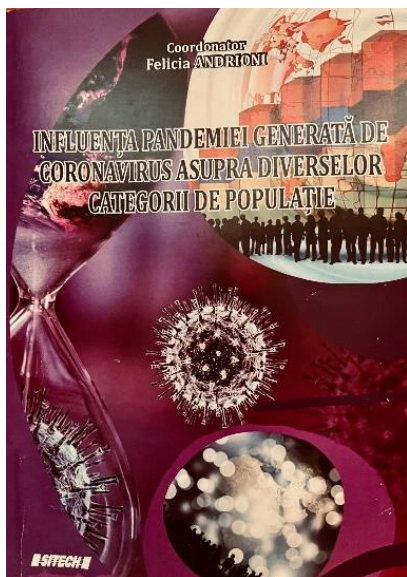
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**BOOK REVIEW:**  
**Felicia Andrioni (coord.). *Influența pandemiei generate de Coronavirus asupra diverselor categorii de populație*, Craiova: Sitech, 2021, 230p.**

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The volume "*Influența pandemiei generate de Coronavirus asupra diverselor categorii de populație*" (engl: "*The influence of the Coronavirus pandemic on various categories of population*") addresses a topic of wide scientific interest in the field of sociology, a topic that has been found in the topic of many books, studies and published articles, starting with March 2020. It is well known that the COVID-19 pandemic has had many negative effects on all subsystems of social life and has had a strong impact on the physical, mental and daily health of many sections of the population. In fact, this is the idea around which this volume, coordinated by Felicia Andrioni, is articulated, a volume in which we find studies carried out by researchers and doctoral students in the fields of sociology and social work.

Moreover, as the coordinator of the volume states, one of the key concepts is the concept of "resilience" (which again highlights the importance of the topic), the volume being based on the analysis and identification of resilience of the population in the context of the COVID-19 pandemic" (p. 8).

With a size of 230 pages, the volume is structured in two parts: one with a much more theoretical character, and the second comprising studies with a strong application component. The first part of the volume brings together 4 studies aimed at the impact that the COVID-19 pandemic had on four categories of the population: youths, the elderly, people affected by HIV / AIDS, families with children. The second part of the volume has a practical component and brings together studies that present results of quantitative and qualitative research on the effects that the COVID-19 pandemic had on students. The last chapter of the volume presents the results of a research "based on the elements of positive psychotherapy" (p.9)

The first chapter of the paper, entitled "The impact of the COVID-19 pandemic on families and children (having as authors Roxana Catalina Ghiță and Felicia Andrioni) presents the main factors that can be considered to measure this impact: digital connection, divorce rate, marriage rate, domestic violence, alcohol consumption, the re-signification of personal housing, social rituals, the dynamics of family relationships. All these factors were analyzed to highlight the problems that families faced during this complex and difficult period. What is extremely

interesting is that the authors of the study also presented a series of extremely useful recommendations to help the resilience of a family member. A significant part of the study also focuses on children who "were deeply affected by the impact of the pandemic on mental health, which could have long-term effects" (p. 23). The importance of approaching this topic is extreme, especially because - as the authors of the study claim - "in many societies, the mental health of children and adolescents is not a priority at the level of social policies" (p. 23). The chapter presents the main challenges faced by children in the pandemic: access to education, access to social services, lack of social contacts, etc.

The second study "*The influence of the pandemic on young people in Generation Z*" (having as authors Florin Răduț and Felicia Andrioni) highlights some of the consequences of the pandemic period on young people, from a social, psychological, family and educational perspective. The novelty of this study comes from the fact that it focuses on a category of population that is said to be extremely familiar with the technology and that we would be tempted to believe did not feel so much the negative effects of the pandemic period. They spent a lot of time online, "watching a lot of videos on the internet, being more active on online games, listening to more music" (p. 46). However, the effects were also felt by the representatives of generation Z, especially at the psycho-emotional level (anxiety, depression, emotional disorders, etc.), at the level of family relationships, at the level of consumption of substances that generate dependence on employment in the labour market.

The study "*Coronavirus Pandemic Implications for Seniors*" (having as authors Gianina Chirugu and Felicia Andrioni) focuses on a vulnerable population category - the elderly, who, as the authors present, are vulnerable for several reasons: "old age, diseases, social habits, nutrition and poor living conditions" (p. 64). The structure of the study begins with some conceptual delimitations - extremely useful for readers to understand concepts such as old age, active aging, the elderly. Extremely useful for readers are also the statistical data that highlight the vulnerability of this category of population in the context of the pandemic. The study also highlights the issue of institutionalized elderly in care centers. For them, the diseases they suffered from were neglected due to the restrictions applied during the pandemic period: "partly due to the limitations regarding hospitalizations only for life-threatening diseases and partly due to the restriction of access to social work and healthcare facilities". (p. 93).

The category of persons affected by HIV / AIDS as a vulnerable category in the context of COVID-19 is presented in the study developed by Cosmin Sicrea and Felicia Andrioni. After an introductory part on general issues about the HIV-AIDS virus, the authors focus on the effects felt by people living with HIV-AIDS during the pandemic. The most important effects felt were: the amplification of "barriers to access to adequate diagnosis, treatment and medical care, to specific medical tests" (p. 151). The effects felt by this category of population were also social, especially when they resorted to social work services.

The application part of the volume focuses on two studies: the first of these - "*The effects of the Coronavirus pandemic on students*" (having as authors Felicia Andrioni, Ioan Valentin Fulger and Stefan Albert Diaconescu) presents the results of a quantitative (questionnaire) and qualitative research (self-reflection biographical), on a group of 30 subjects, students at the University of Bucharest, accommodated in the Campus of this higher education institution. The research aimed to capture some important characteristics (social,

demographic, health, etc.) of students, as well as their perception of academic life during the pandemic. The 11 biographical self-reflections presented in this study highlight the impact that COVID-19 had on this category of population. In addition, along with the methodological part, the study is a working model that can be applied to other topics, using the same research methods.

The latest study in the book *"Increasing Anxiety Symptoms Under the Influence of the Coronavirus Pandemic"* (authored by Nicoleta Plesan) presents a model of intervention through positive psychotherapy, which the author defines as "a humanistic, psychodynamic and cross-cultural method, focused on conflict and capacity-oriented" (p. 203). The intervention model presented in this study is focused on 5 steps: "observation-distancing, inventory, situational encouragement, verbalization and goal-setting" (p. 203). The study is extremely useful because it can be an intervention model that can be applied in other situations, not only the one presented by the author.

The volume *"The influence of the Coronavirus pandemic on various categories of population"* is both a tool for reading, reflection and a working tool for students, PhD students or researchers interested in the subject, containing information of scientific relevance, relevant statistical data, profiles of some categories of vulnerable population in the pandemic period. In addition, the two studies presented in the second part of the volume can be examples of research that can be successfully applied in the scheme of analysis of any social problem.